DESIGN SPECIFICATIONS DOCUMENT

ENTERPRISE SCHEDULING SYSTEM (ESS)
SCREEN PACKAGE

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Design Specification Document Version Information

The first release of this design specifications document as a project deliverable is numbered 1.0.

Subsequent revisions are numbered 1.1, 1.2, 1.3, etc. Content revisions are listed below with corresponding page numbers.

Version Number	*Date*	*Content Revisions*	*Page #*	*Revised by*
1.0 (First Release)	April 5, 2022	Original		
1.1 (First Revision)	May 31, 2022			
1.2 (Second Revision)				

1. ESS Public Interface Walkthrough

1.1. Create Appointment – Self-scheduling

Customer completes the appropriate form in oSSNAP. The customer receives a link to ESS, and the link directs the customer to log in via Login.Gov to use ESS to self-schedule an appointment. Once the customer is logged in, ESS presents a brief description of what the customer can expect from ESS. The customer clicks “Next” to advance to the Terms of Service and Privacy Act Statement. If the customer does not want to continue, they can click “Exit” to exit ESS.

Because the user is logged in, the user’s name appears in the top banner along with a Sign Out control.

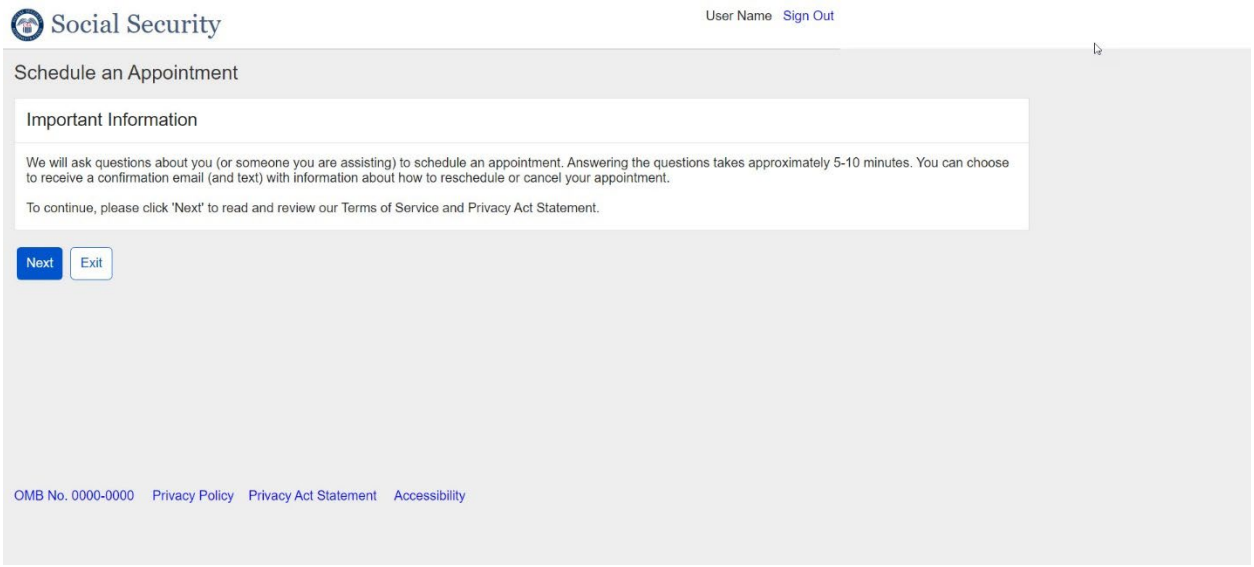


Figure 1 ESS Customer Home Page

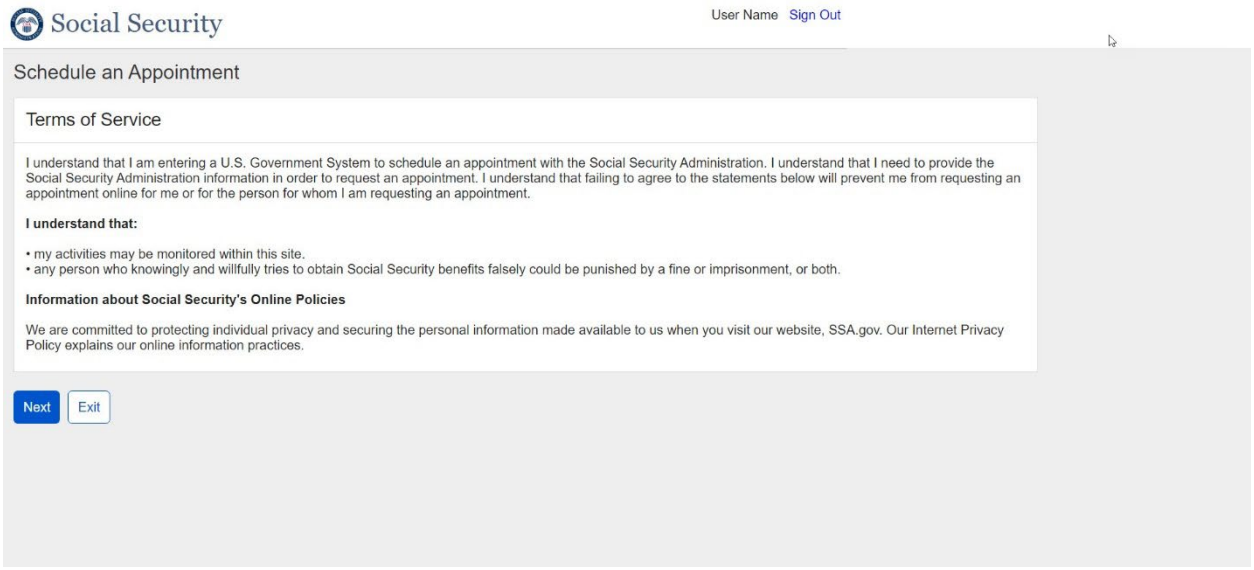


Figure 2 ESS Customer Terms of Service

The customer clicks "Next" to advance to the Privacy Act Statement or "Exit" if they want to exit ESS.

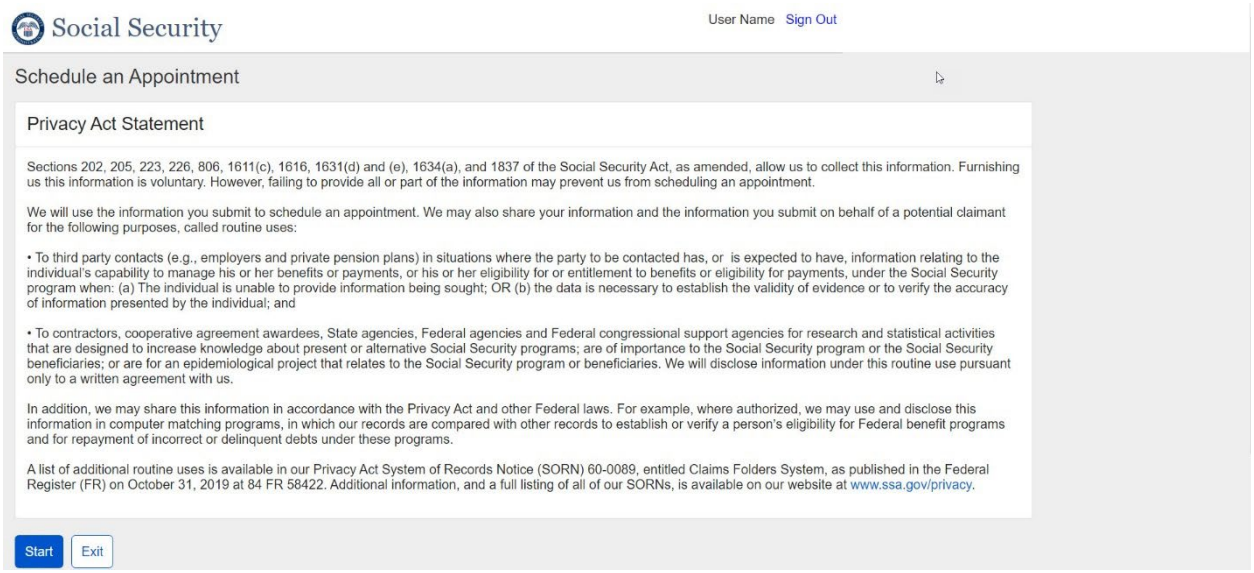


Figure 3 ESS Customer Privacy Act Statement

The customer clicks “Start” to continue.

ESS asks for the reason for the appointment that is “original or replacement social security card.”

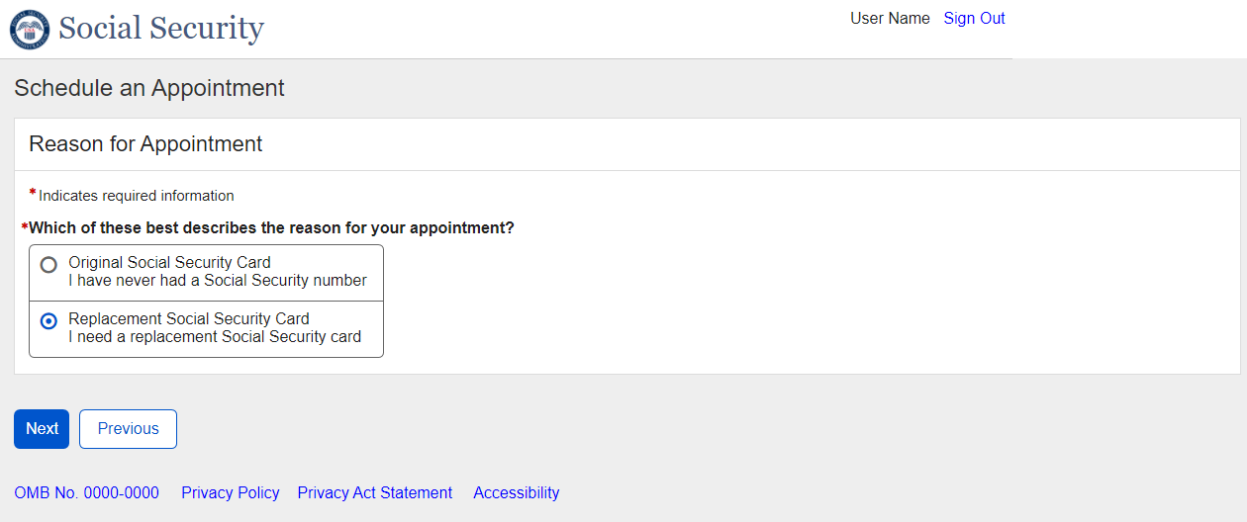


Figure 4 ESS Customer Reason for Appointment

The customer clicks “Next” to continue.

ESS asks the customer for a ZIP code, so it can find an available appointment nearby. ESS prefills the ZIP code field with the ZIP code from oSSNAP.

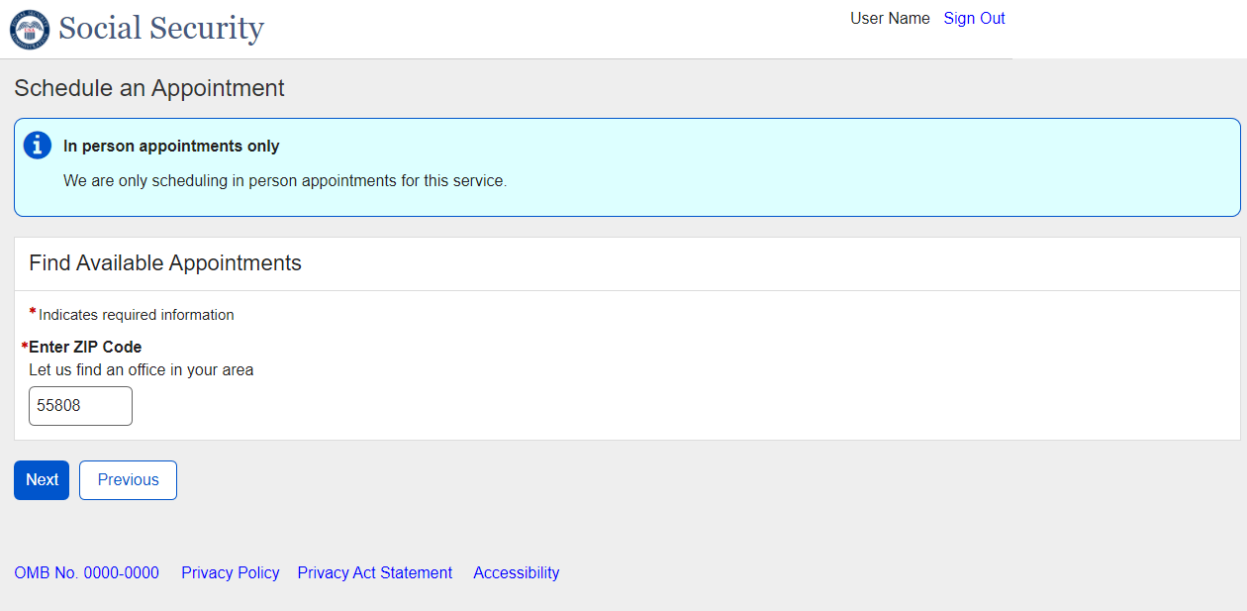


Figure 5 ESS Customer Enter ZIP Code

The customer can change the ZIP code. If the customer changes the ZIP code to one that is not initially supported by ESS, ESS displays a message:

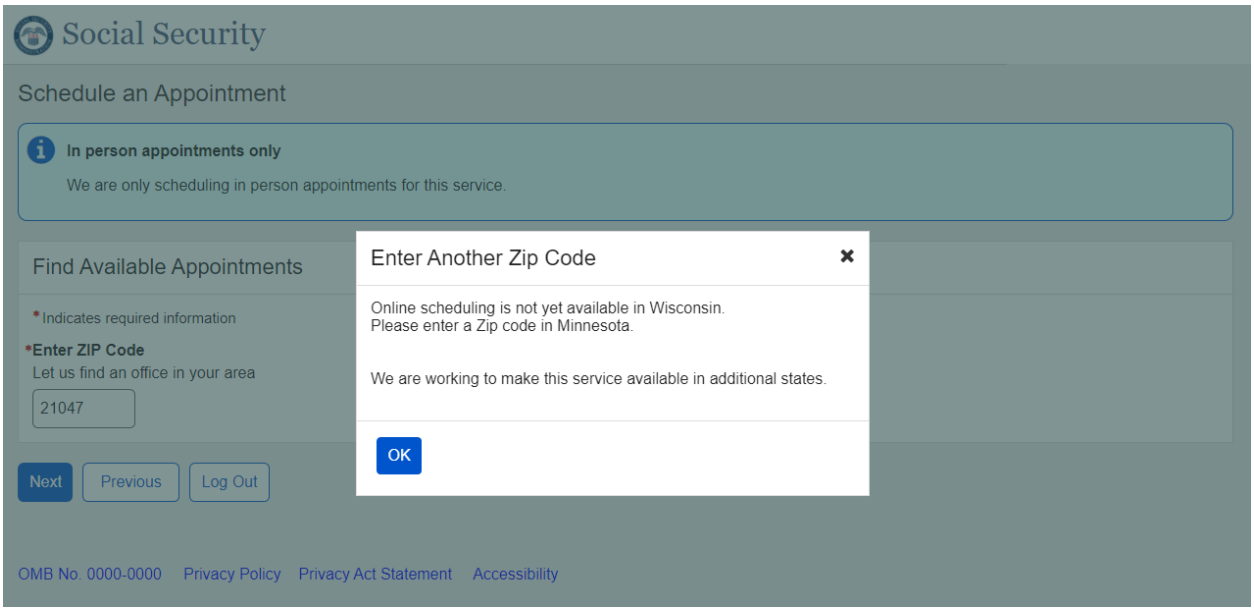


Figure 6 ESS Customer Enter Another ZIP Code

The customer clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.

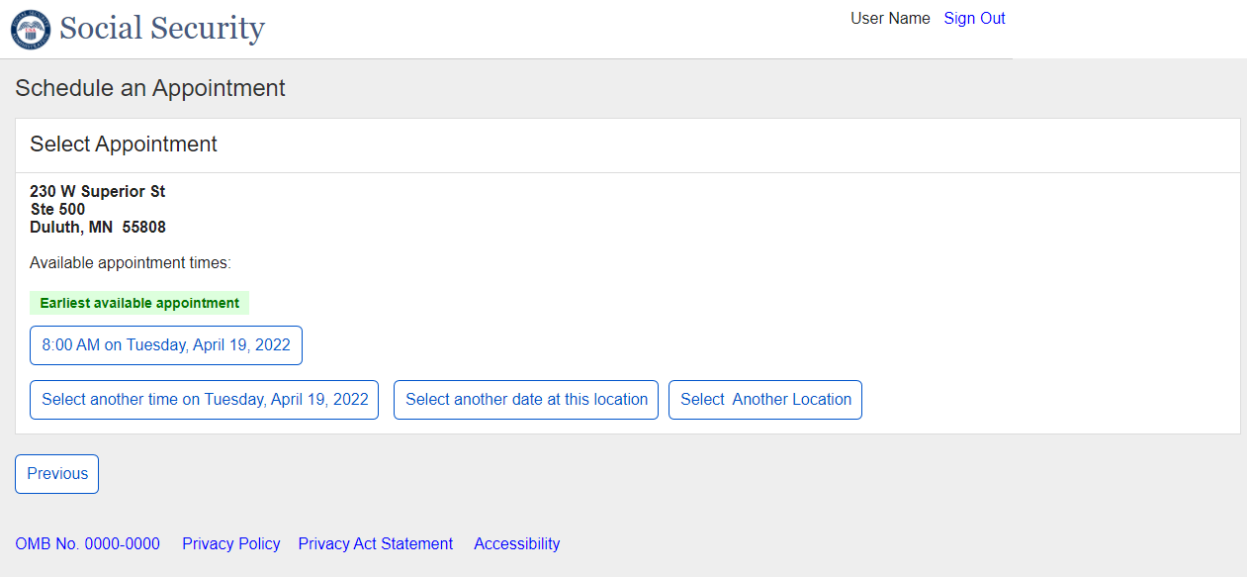


Figure 7 ESS Customer Earliest Available Appointment

If the customer finds the time and date acceptable, the customer clicks the button with the time and date on it and confirms the appointment selection.

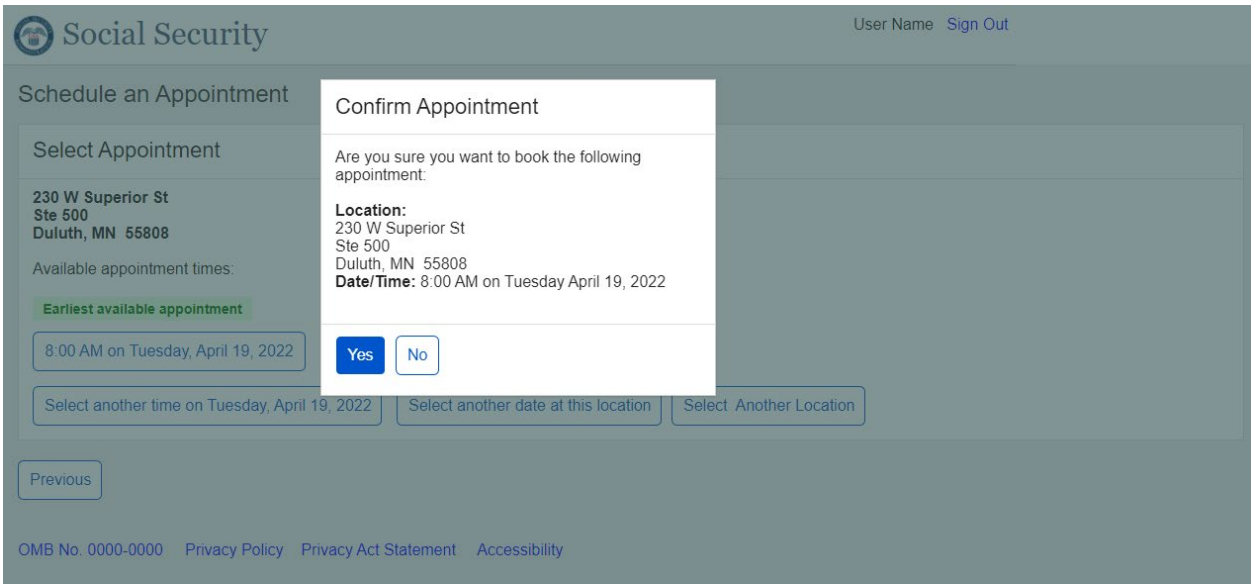


Figure 8 ESS Customer Confirm Appointment

If the customer accepts the date, but not the time, the customer can click on “Select Another Time on…”

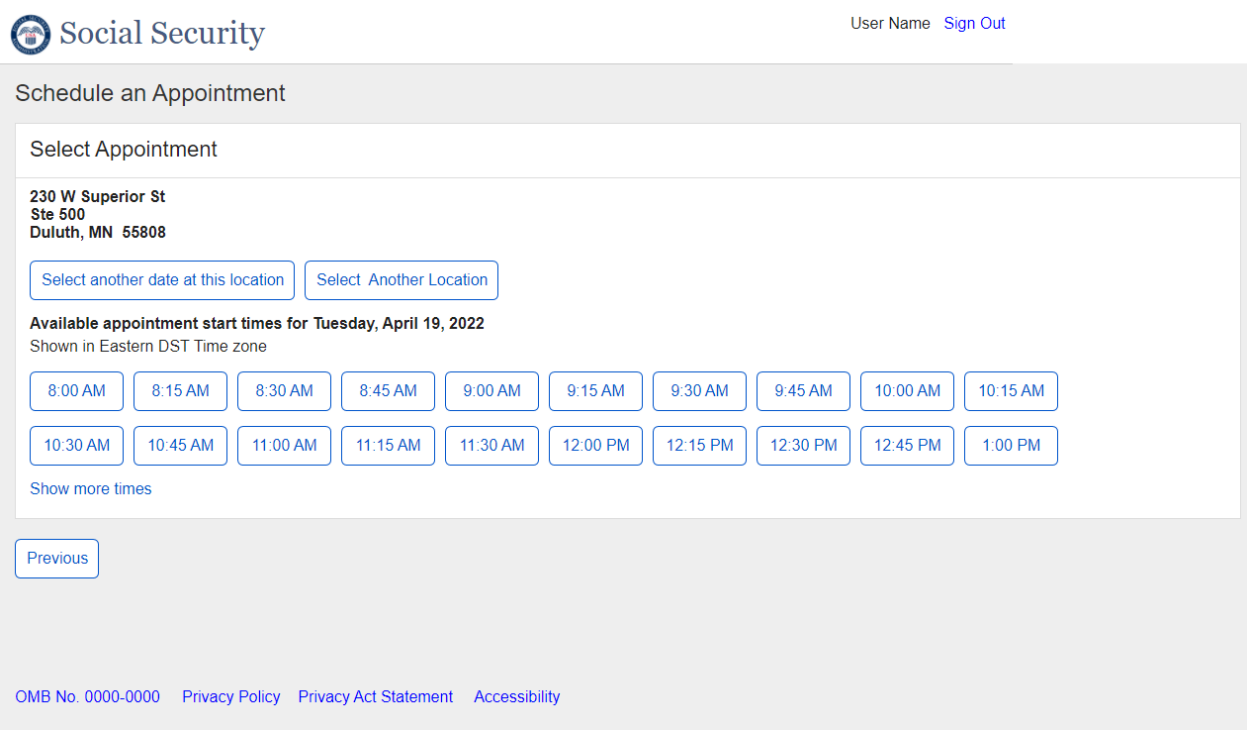


Figure 9 ESS Customer Show Other Times on Same Date at Same Location

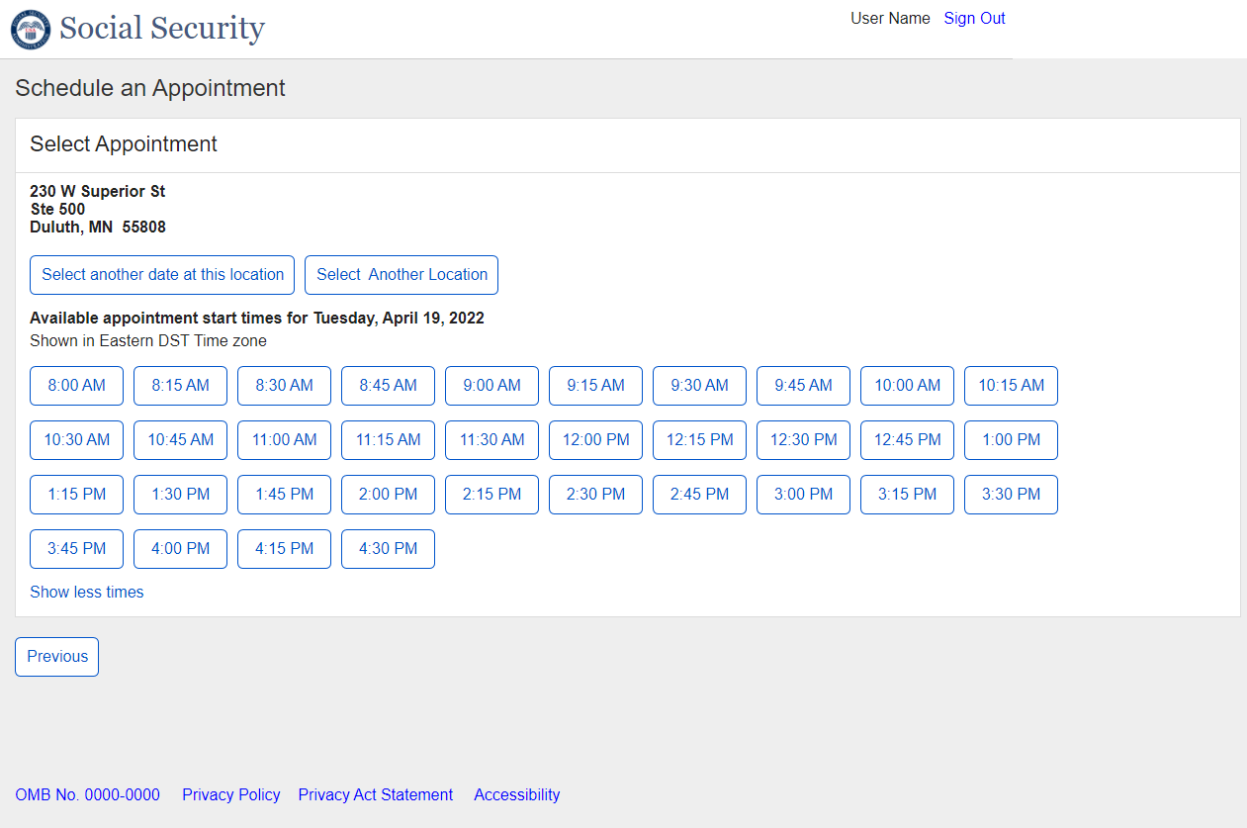


Figure 10 ESS Customer Show More Times

ESS presents other available appointment times on the same date. ESS displays some of the available times. The customer can click “Show more times” to view additional start times. If the customer finds a time and date acceptable, the customer clicks the button with the time on it and confirms the appointment selection.

If the customer accepts the office location, but not the date, the customer can click Select Another Date at this Location.

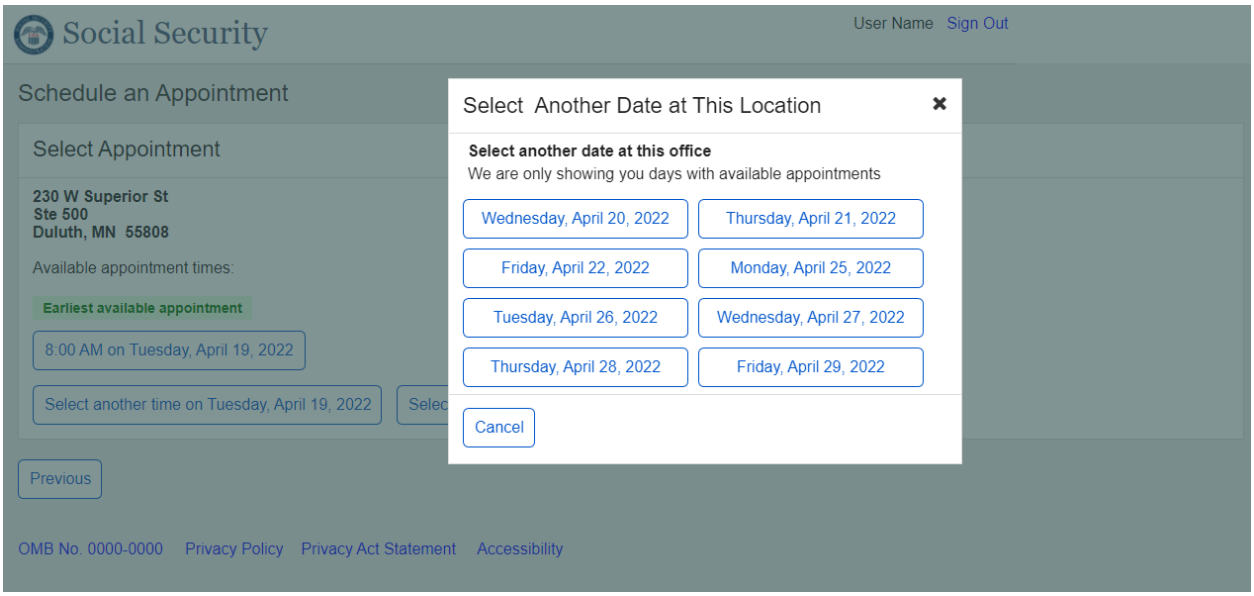


Figure 11 ESS Customer Select Another Date at This Location

ESS presents other dates at the same office. ESS shows only those dates where the office has at least one available appointment. The customer selects the desired date by clicking the date button.

ESS presents appointment times on the selected date at the same office location.

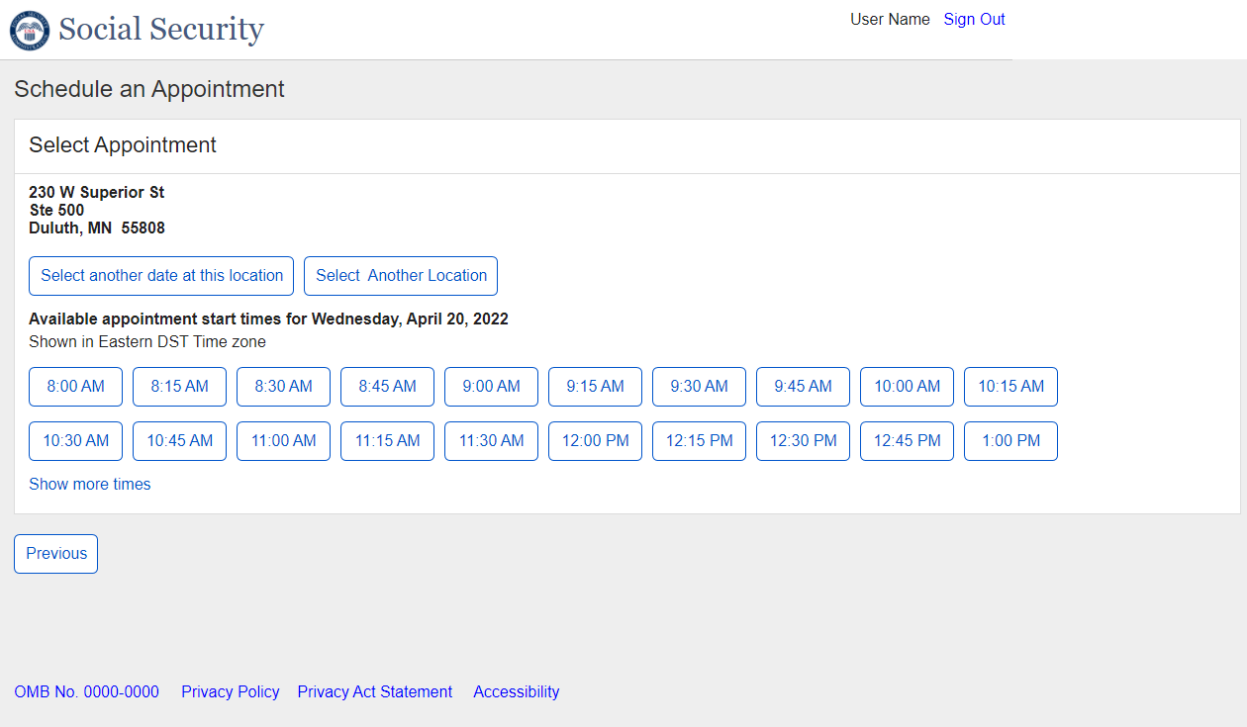


Figure 12 ESS Customer Select Appointment Time

If the customer does not accept the location, the customer can click on Select Another Location.

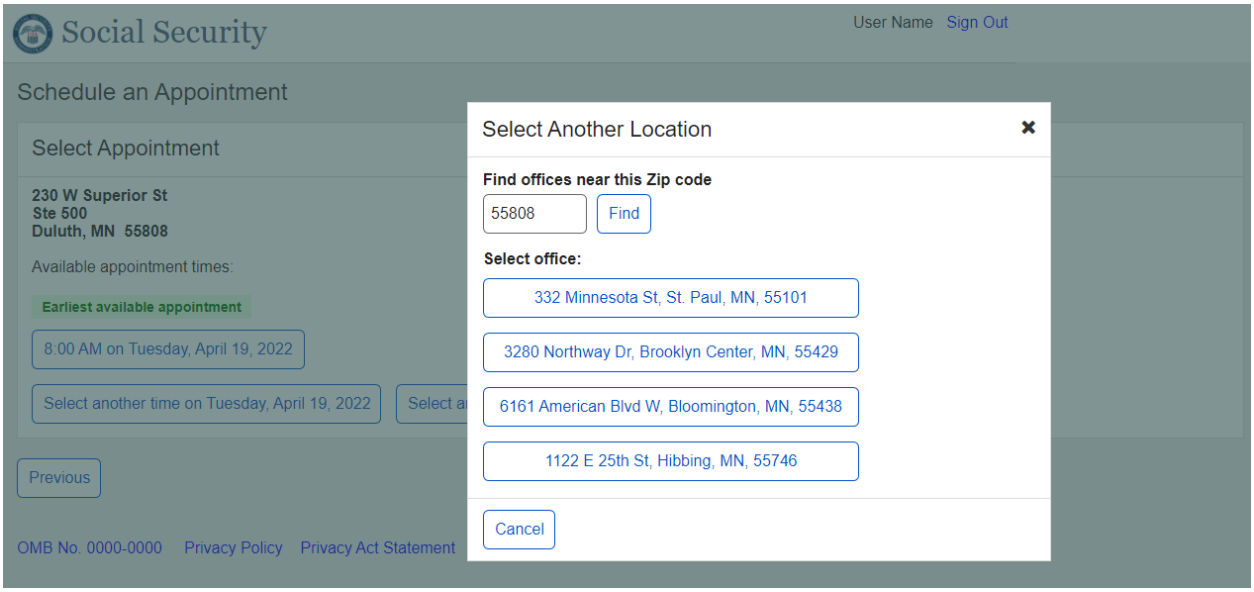


Figure 13 ESS Customer Select Another Location

ESS displays a list of other offices in the same district for the ZIP code. The customer can select one of the listed offices by clicking the button associated with it. The customer can search a

new ZIP code by entering it and clicking Find. ESS will show offices in the district for the entered ZIP code.

ESS presents appointment times on the selected date at the newly selected office location.

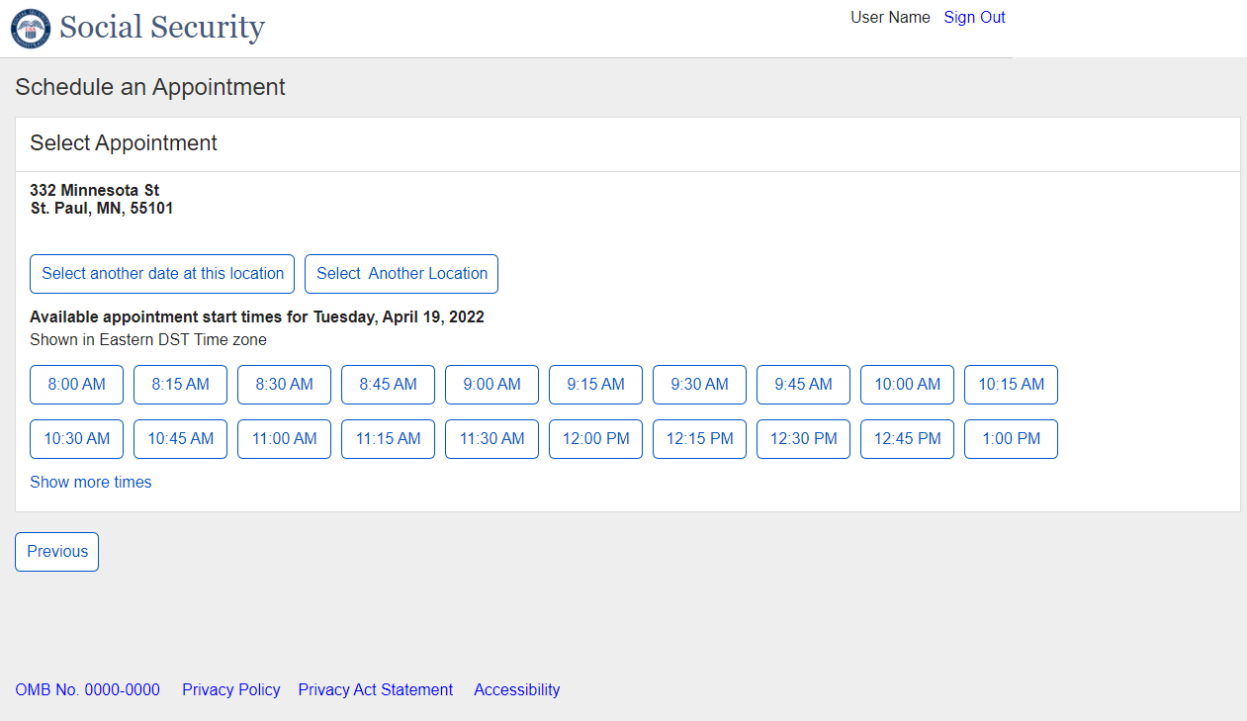


Figure 14 ESS Customer Select Appointment Time

When the customer finds an acceptable appointment date, time, and location, the customer clicks the button with the date and time on it. A confirmation message appears.

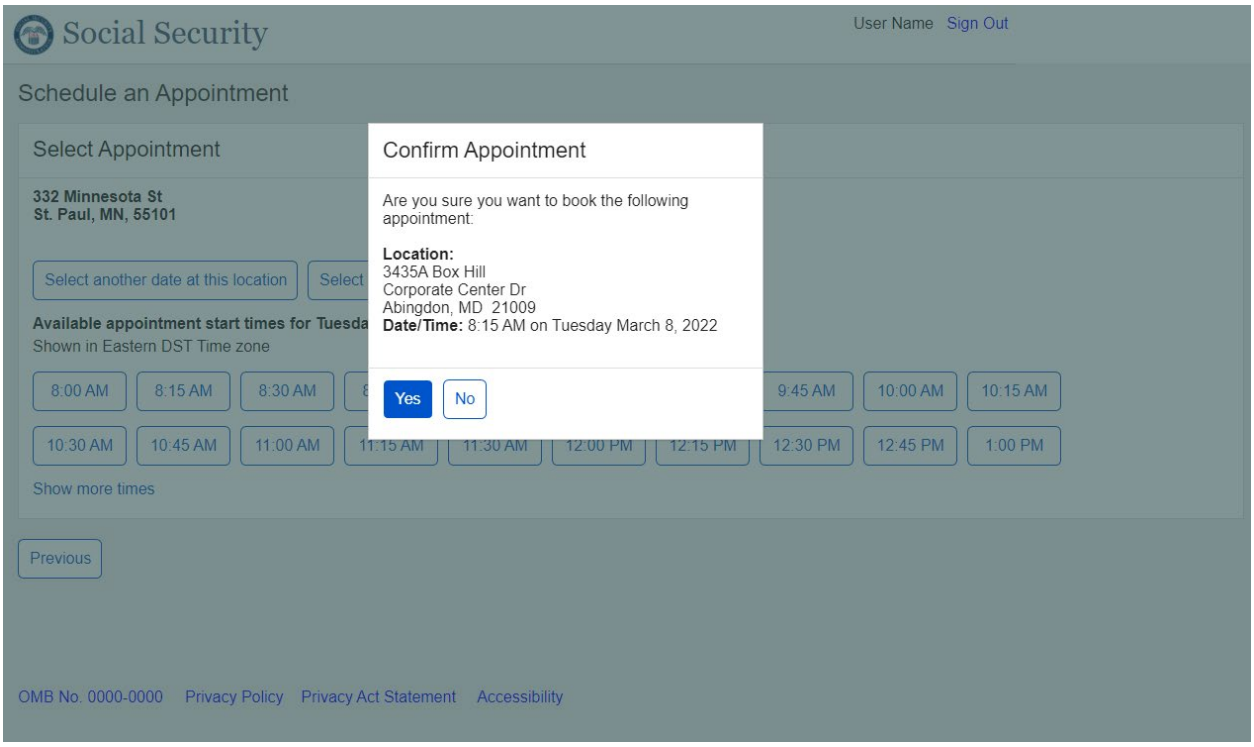


Figure 15 ESS Customer Confirm Appointment

Customer clicks Yes to continue.

ESS asks for the customer's name and consent to messaging.

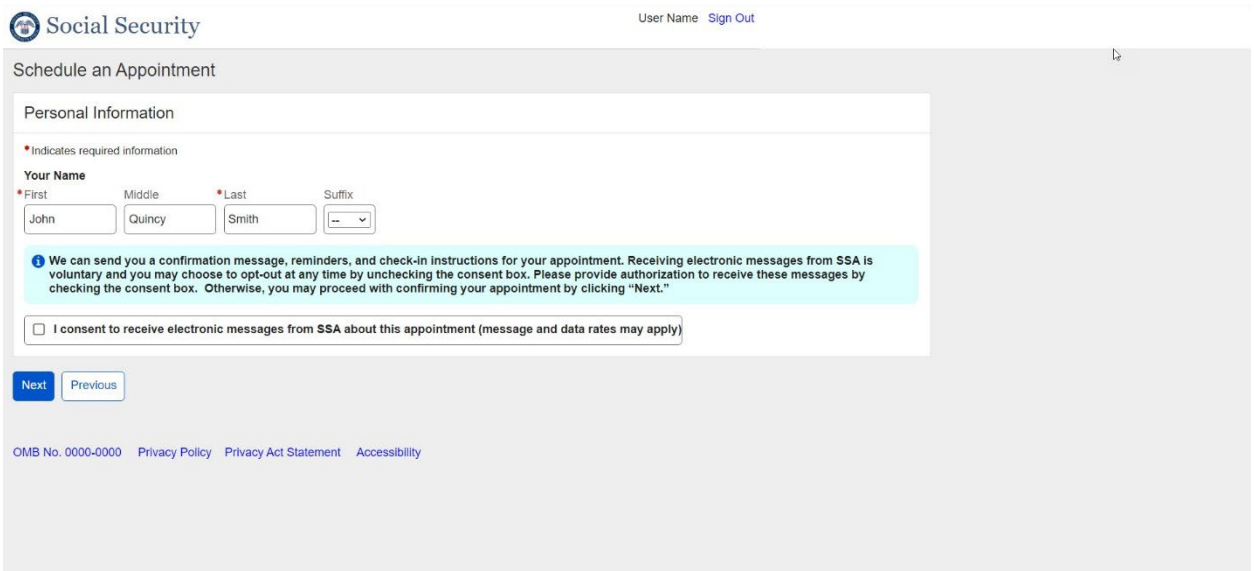


Figure 16 ESS Customer Personal Information Before Consenting to Messaging

Customer's first and last name are required. Middle name and suffix are optional.

Customer can consent to receive electronic messages from SSA by clicking the check box. If customer does not check the Consent check box and clicks Next, a message appears to inform the customer that SSA will not send messages and explain what the customer must do to change, update, or cancel the appointment, and what the customer must do upon arrival at the appointment.

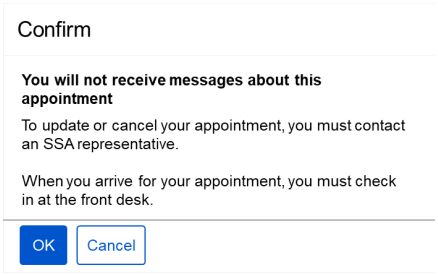


Figure 17 ESS Customer User Does Not Consent to Messaging

When checked, ESS asks how the customer would like to receive the messages.

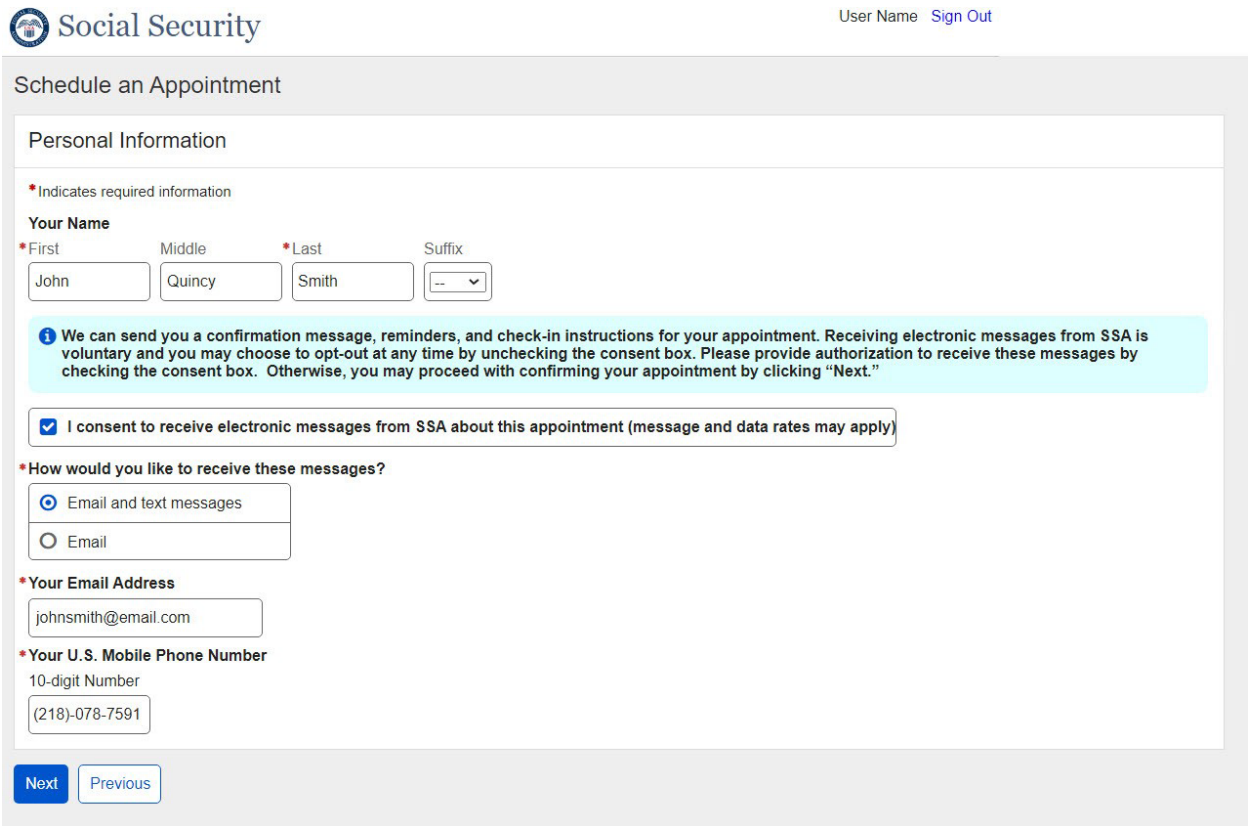


Figure 18 ESS Customer Personal Information After Consent to Messaging – Email and Text Messaging

If the customer's oSSNAP application was completed on behalf of someone else, this page shows the Individual's name, which cannot be edited.

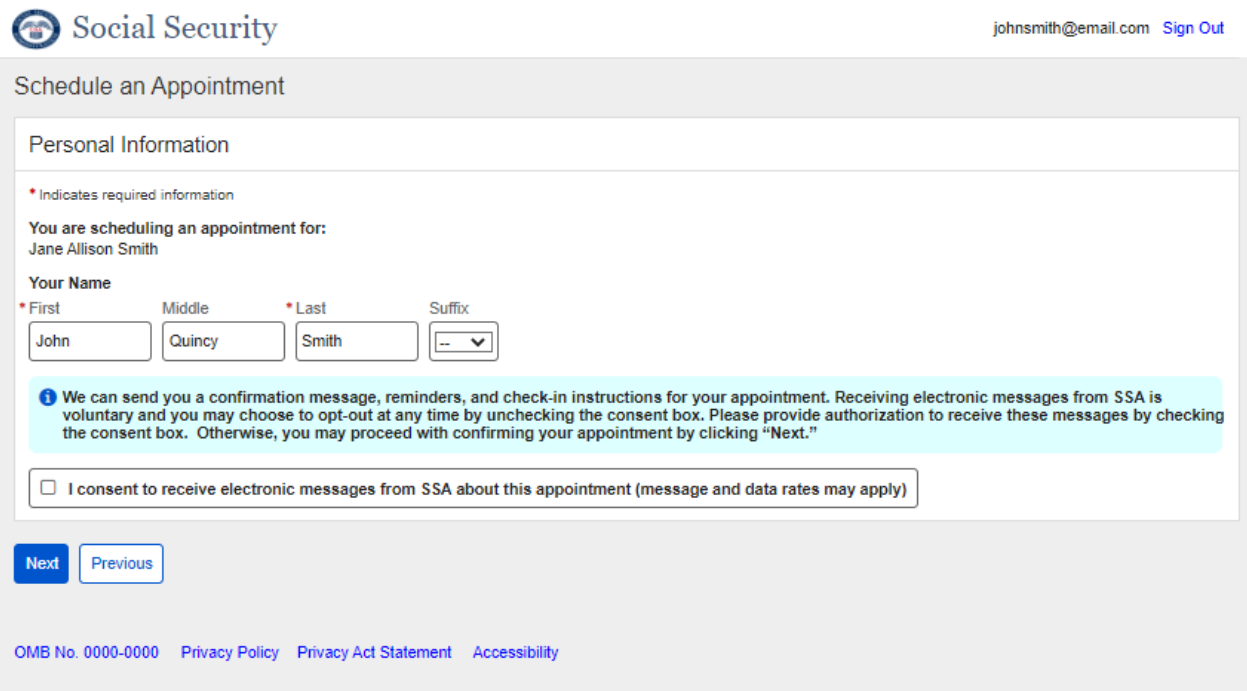


Figure 19 ESS Customer Personal Information Before Consenting to Messaging – Appointment For Someone Else

The customer must select from Email or Email and text messages.

By default, ESS selects Email and text messages. The customer's email address and phone number are prefilled.

If the customer does not want to receive text messages, he or she must select the Email option.

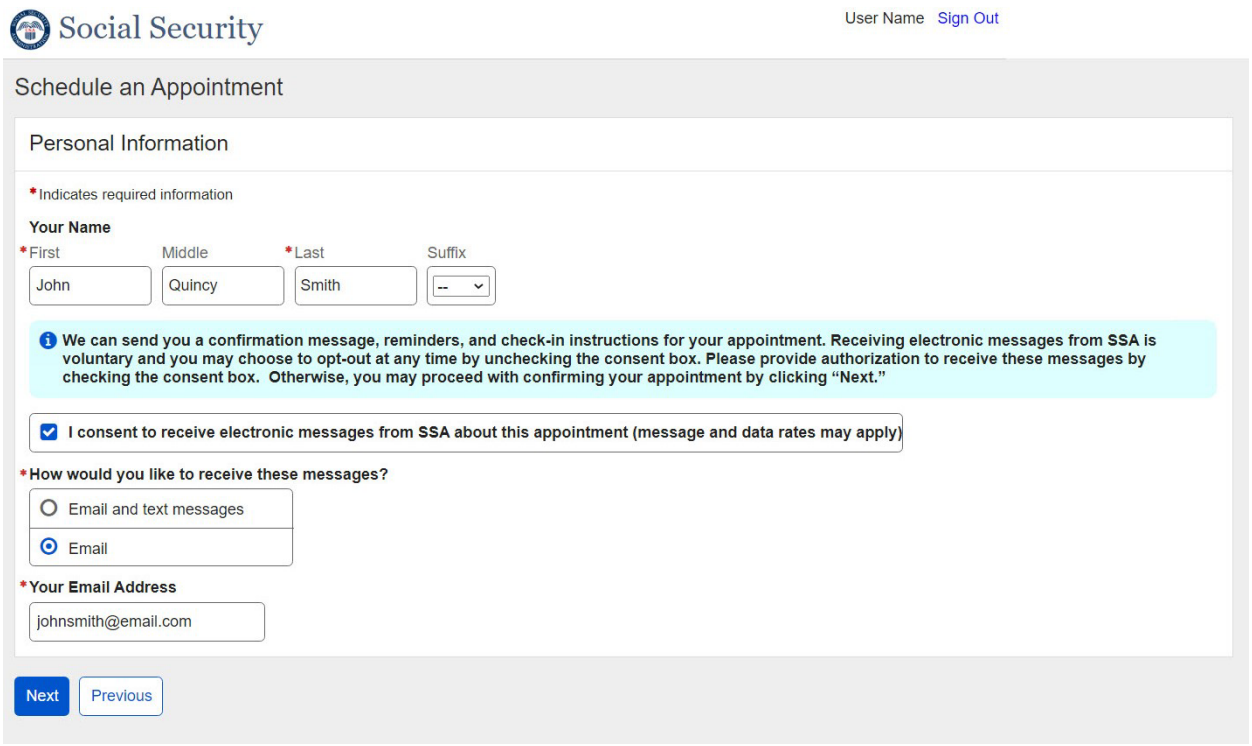


Figure 20 ESS Customer Personal Information After Consent to Messaging – Email

Customer clicks Next to continue.

ESS asks for the customer's language preferences.

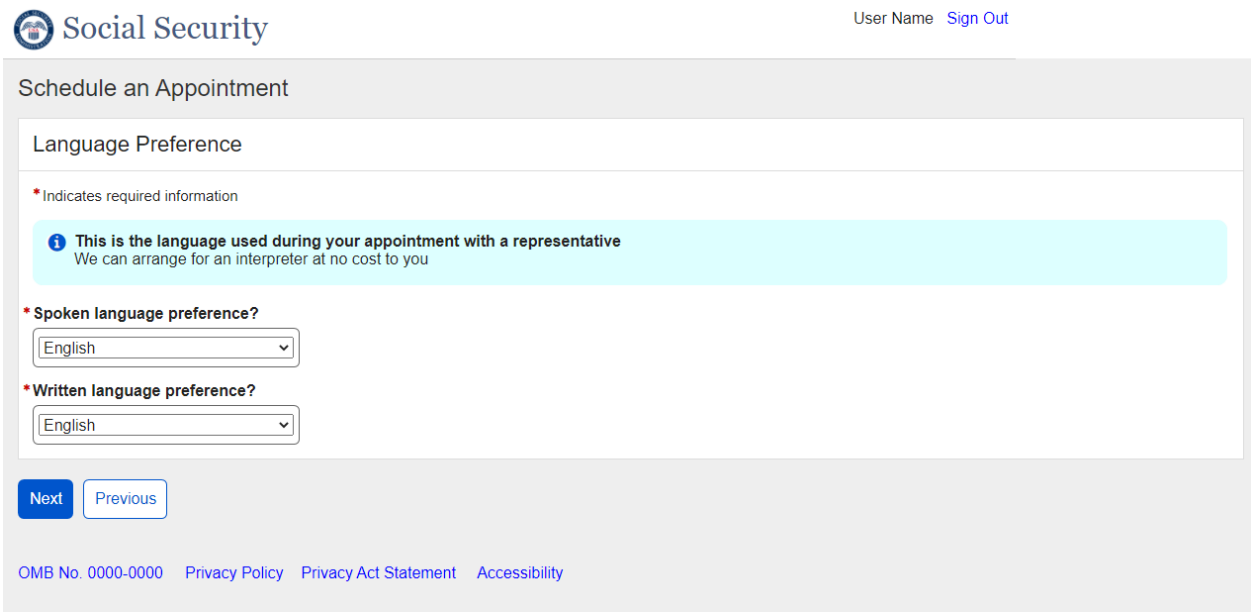


Figure 21 ESS Customer Language Preference

ESS asks for both spoken and written language preferences. Both default to English, but the customer can select another language.

Customer clicks Next to continue.

ESS presents the Review and Submit summary page.

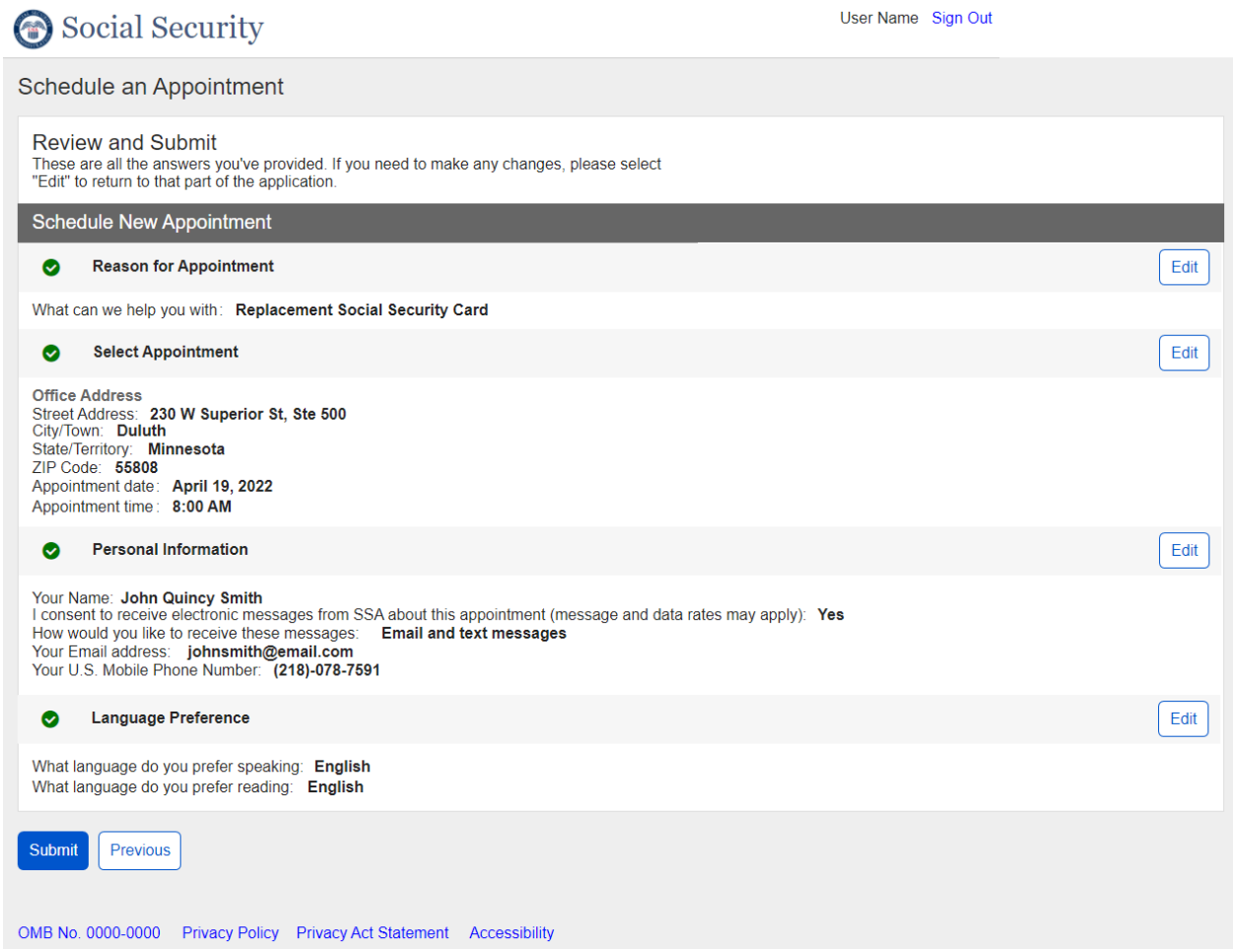


Figure 22 ESS Customer Review and Submit

Customer reviews and can edit the information on this page.

Reason for Appointment Edit button takes the customer to the Reason for Appointment page. If the customer changes the reason, a new appointment date/time and location must be selected. The customer will traverse the pages to complete the scheduling process. ESS will 'remember' the customer's personal information and language preferences, but these can be changed, as well.

Select Appointment Edit button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the previously selected appointment location. The customer will traverse the pages to complete the scheduling process. ESS will 'remember' the customer's personal information and language preferences, but these can be changed, as well.

Personal Information Edit button takes the customer to the Personal Information page. ESS does not change the appointment date/time or location. The customer continues to language preference. ESS 'remembers' the language preferences.

If the appointment was made on behalf of someone else, the individual's name appears in the Personal Information section.

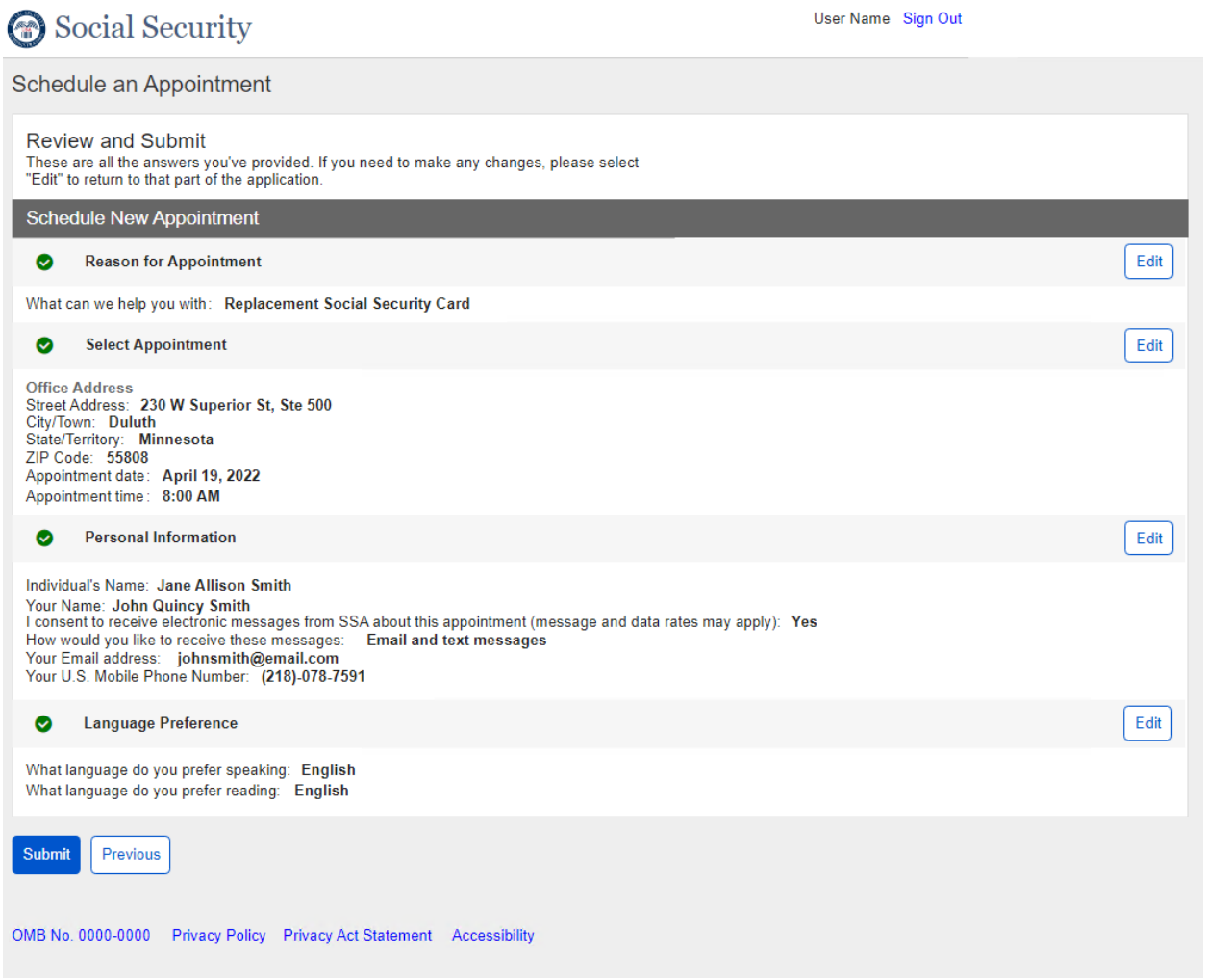


Figure 23 ESS Customer Review and Submit – Appointment for Someone Else

Language Preference Edit button takes the customer to the Language Preference page.

Customer clicks Submit to schedule the appointment.

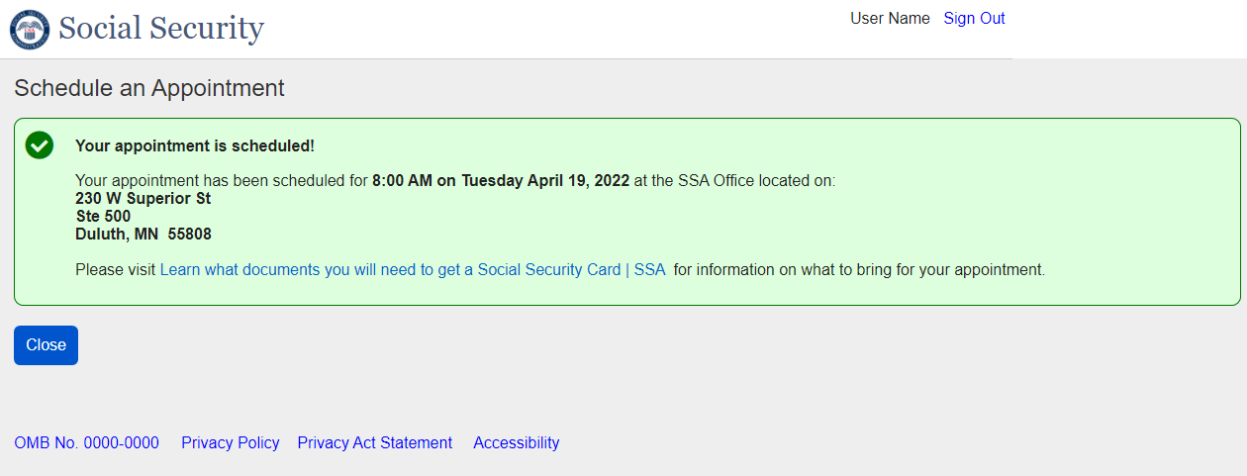


Figure 24 ESS Customer Appointment Scheduled Success

If ESS is unable to schedule the appointment, a message appears indicating that something went wrong and asks the customer to try again. Try Again repeats the Submit action.

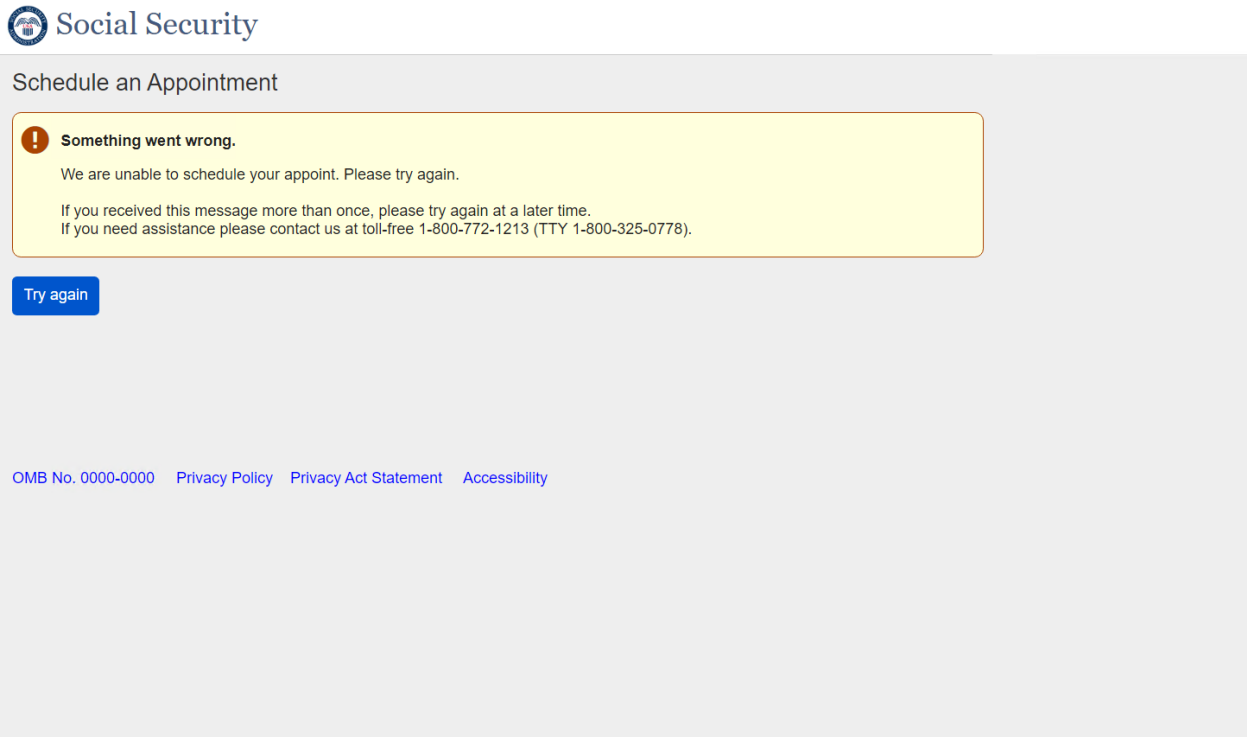


Figure 25 ESS Customer Appointment Scheduled Failure

1.2. Reschedule an Appointment

Customer receives an electronic message from SSA via email or via email and text, based on the customer's selection, with a link to ESS. Customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If the customer opted to not receive electronic messages, the customer received a pop-up message that explains that the customer must contact SSA to make changes.

If the customer schedules the appointment with a technician, the technician offers the customer a chance to create a One Time Numerical Passcode (OTP) to be able to reschedule, modify, or cancel the appointment online. The customer receives a confirmation email and/or text, and may use the link included within the message to access ESS. If the customer chooses to update the appointment using the link, the customer will first log in with existing credentials or register for a new account with Login.gov. At that point, the customer will enter the OTP to link the scheduled appointment with the customer's account.

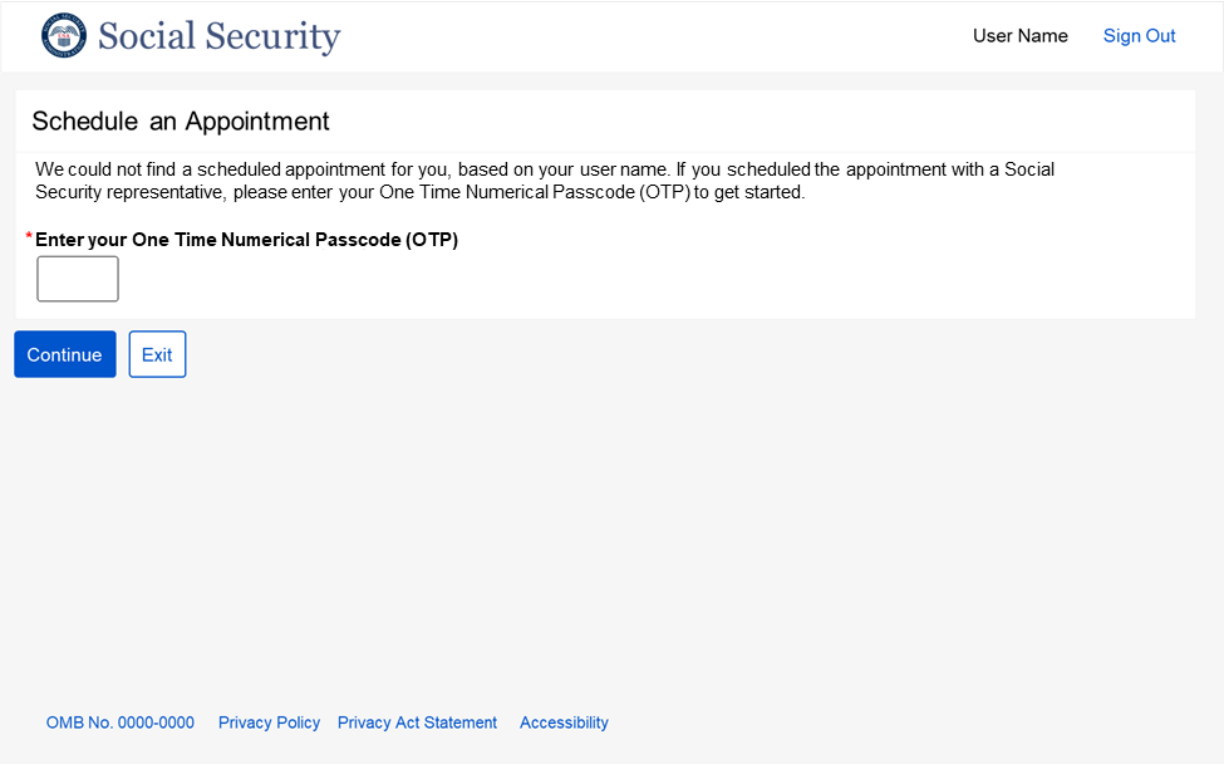


Figure 26 ESS Customer Enter OTP

Once accepted, the customer proceeds to the ESS Home Page.

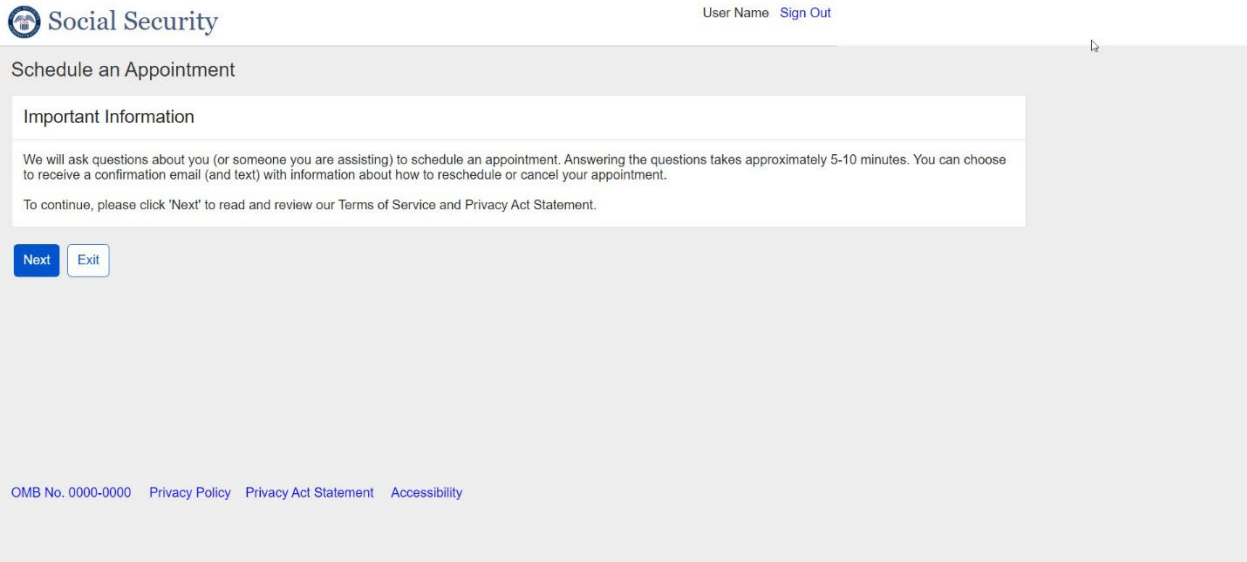


Figure 27 ESS Customer Home Page

The customer must review the Terms of Service and the Privacy Act Statement to continue.

The customer clicks Start to begin.

ESS shows Review Your Appointment Details.

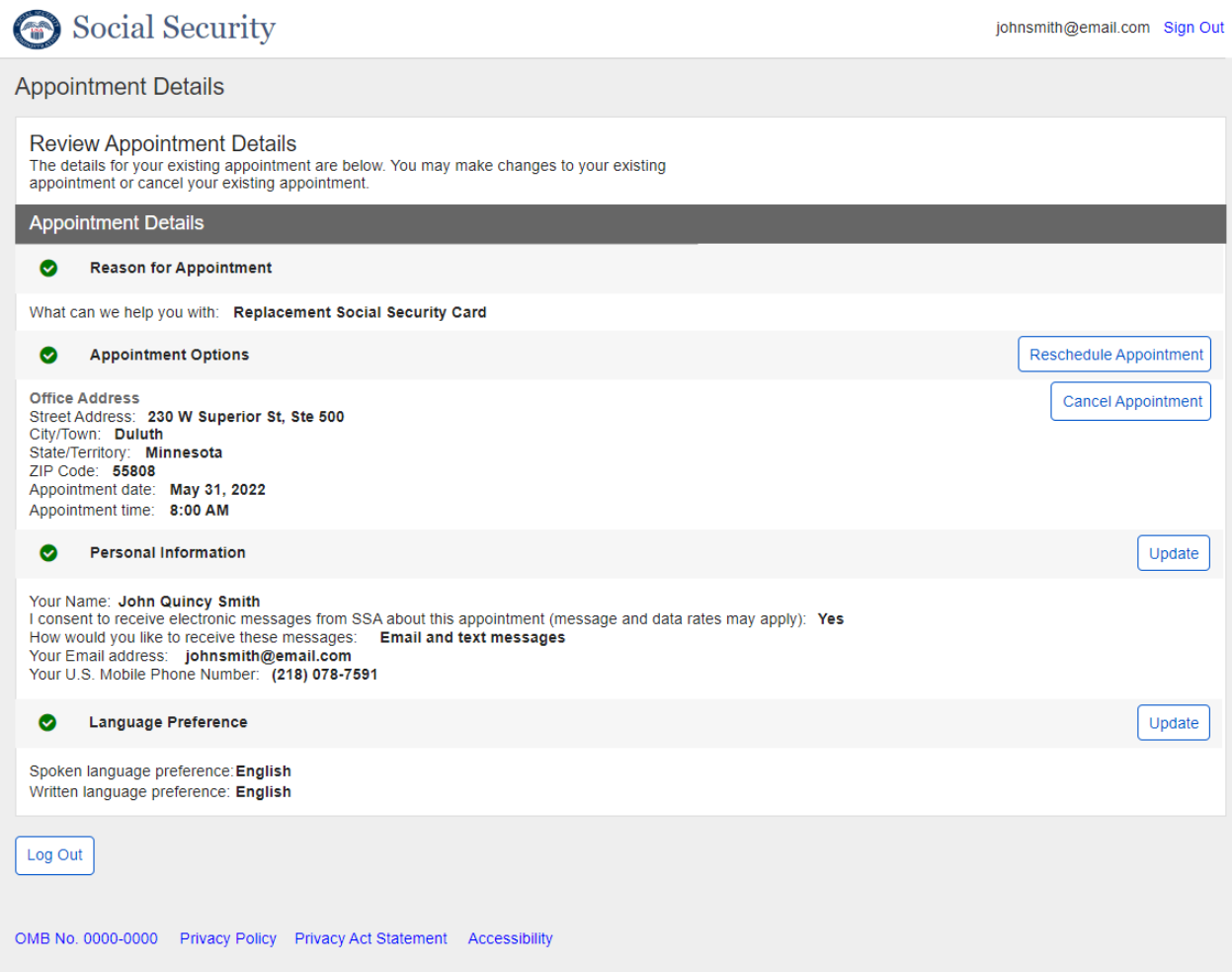


Figure 28 ESS Customer Review Appointment Details

Type of Appointment cannot be changed without canceling and creating a new appointment.

Select Reschedule Appointment button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the current appointment location. The customer may select a new time at the same location, a new date and time at the same location, or a new location, date, and time. When the customer makes the selection by clicking on the chosen appointment start time, ESS returns to the Appointment Details and shows the updated information.

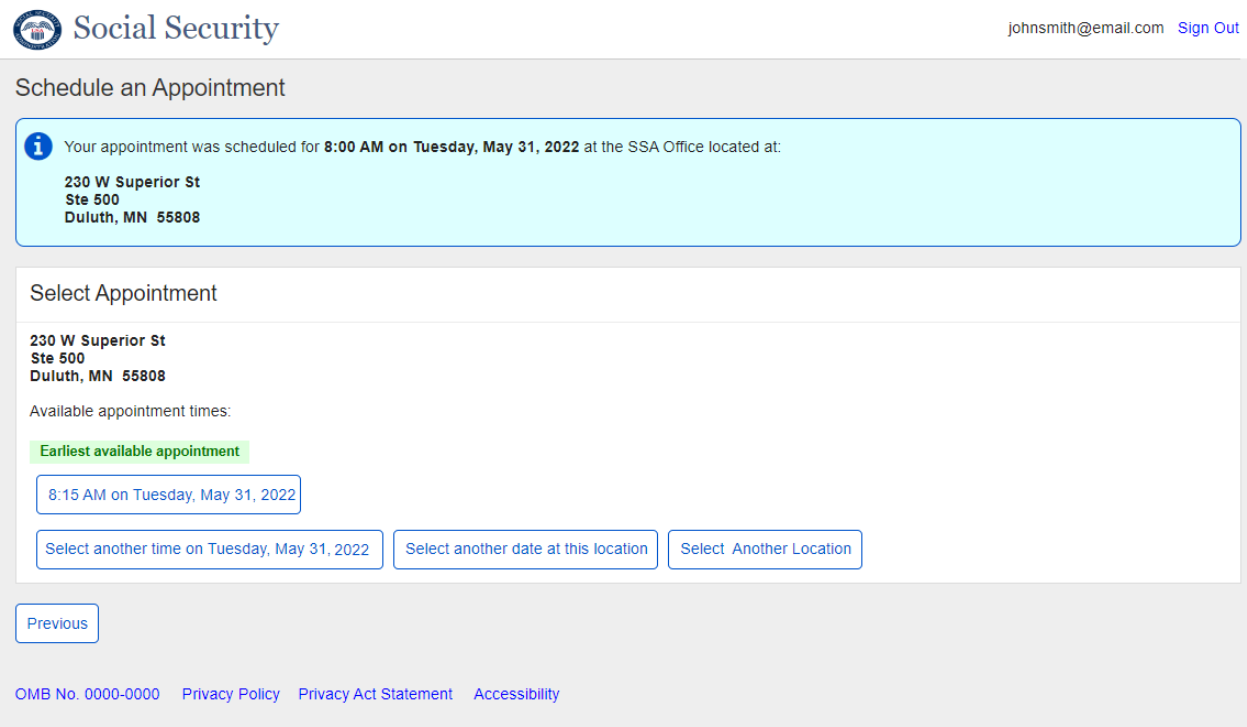


Figure 29 ESS Customer Reschedule Enter ZIP Code

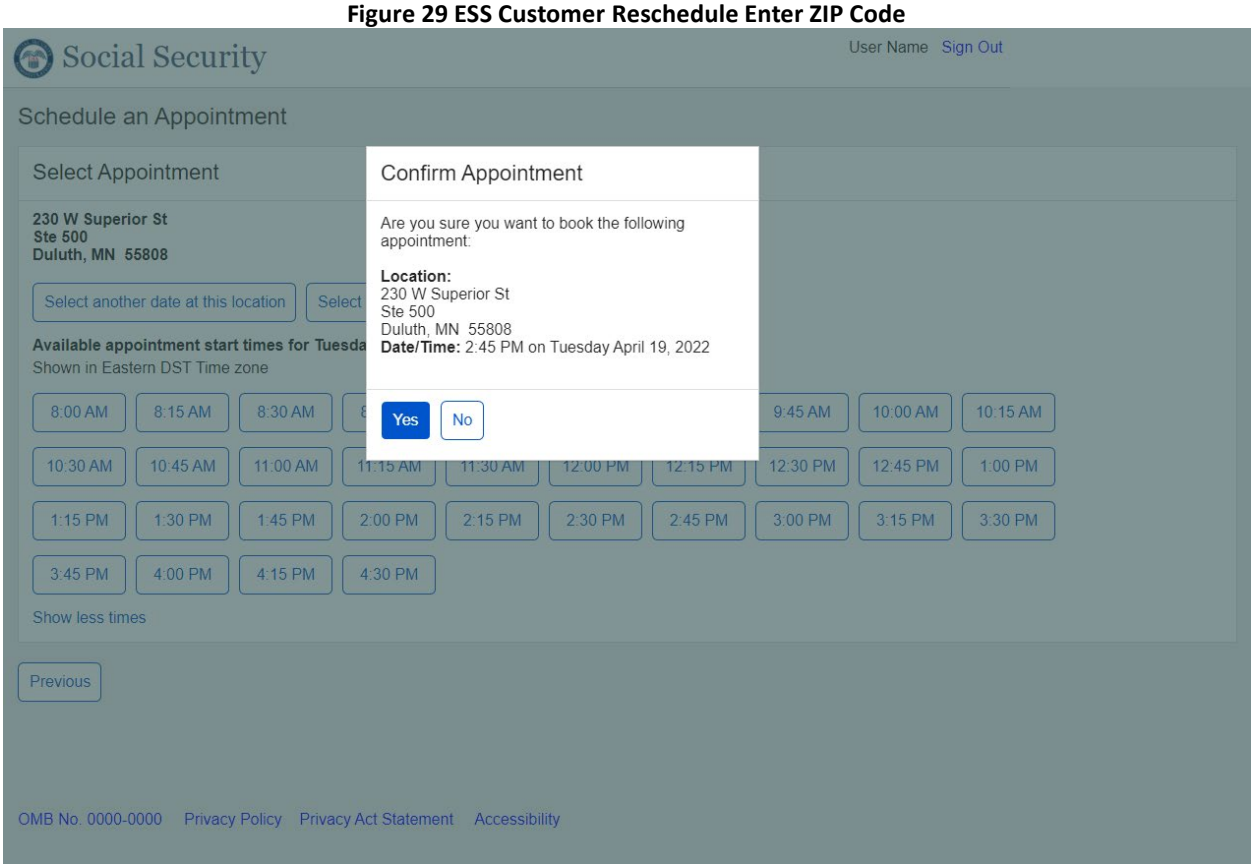


Figure 30 ESS Customer Confirm Appointment

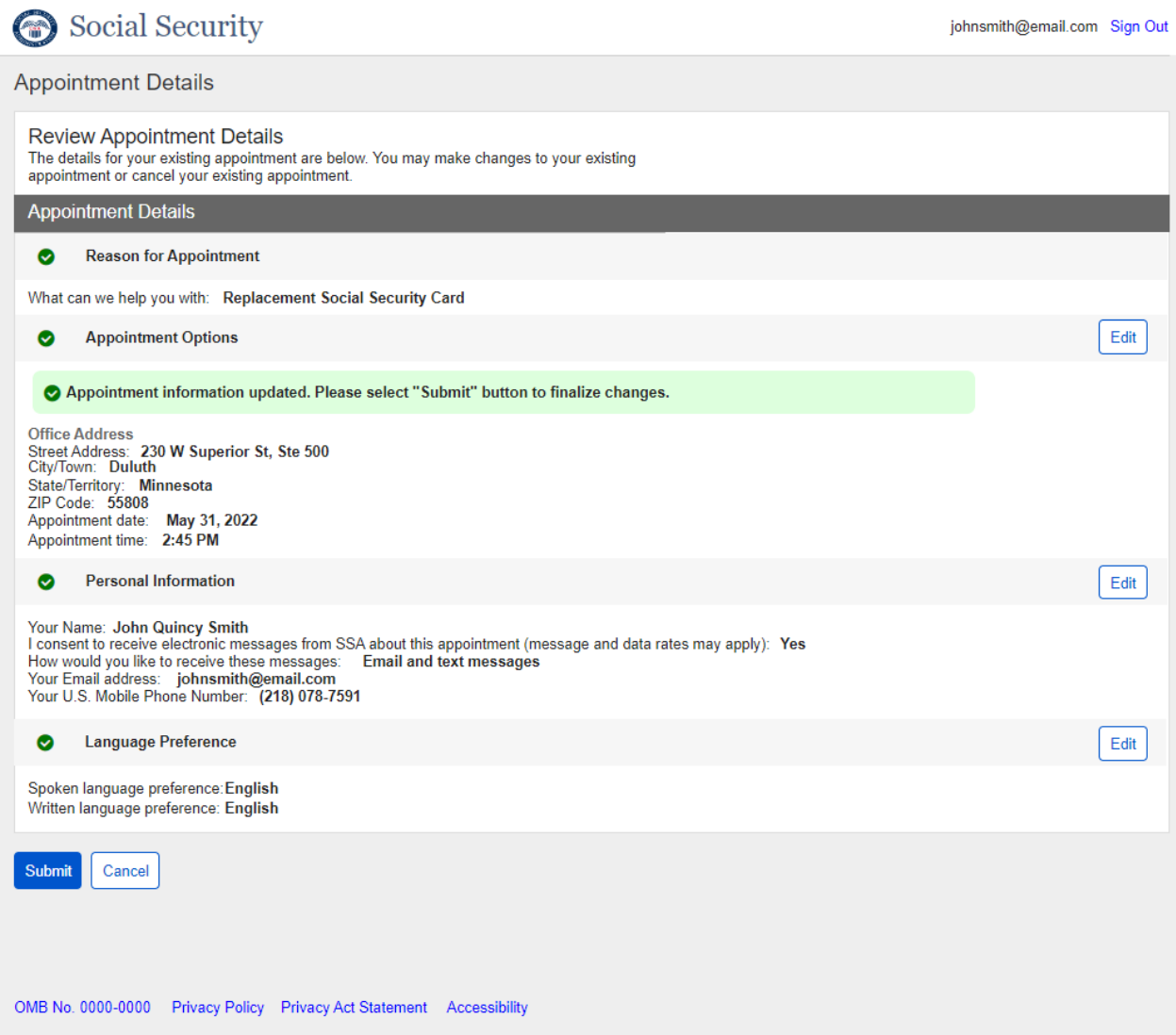


Figure 31 ESS Customer Review Existing Appointment Details Showing Updates

Personal Information Update button takes the customer to the Personal Information page. Clicking Next returns the Customer to the Appointment Details page.

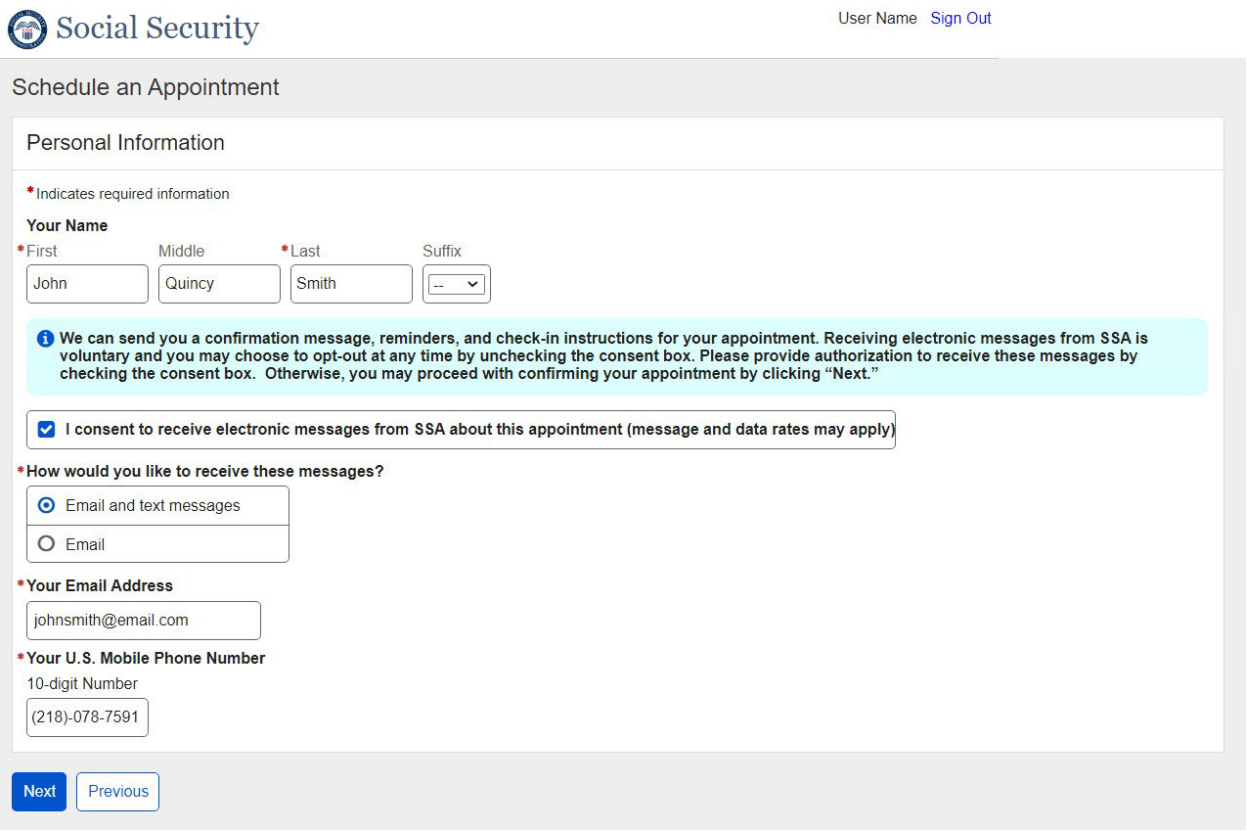


Figure 32 ESS Customer Update Personal Information

Language Preference Update button takes the customer to the Language Preference page. Clicking Next returns the Customer to the Appointment Details page.

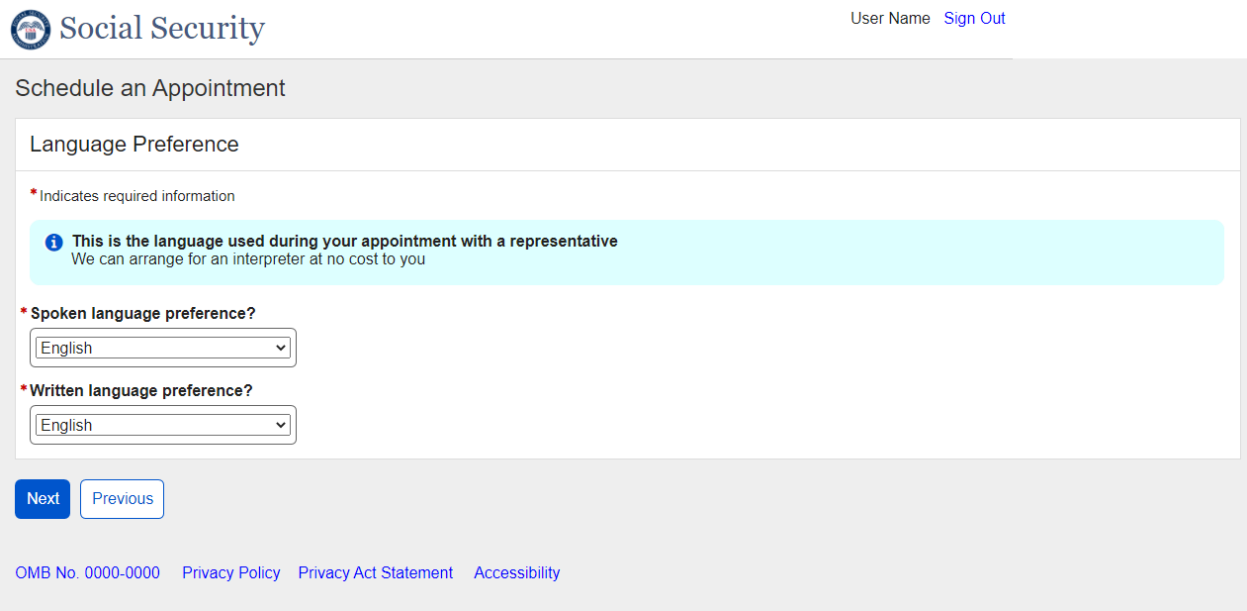


Figure 33 ESS Customer Update Language Preferences

Any changes are reflected on the Review and Submit page.

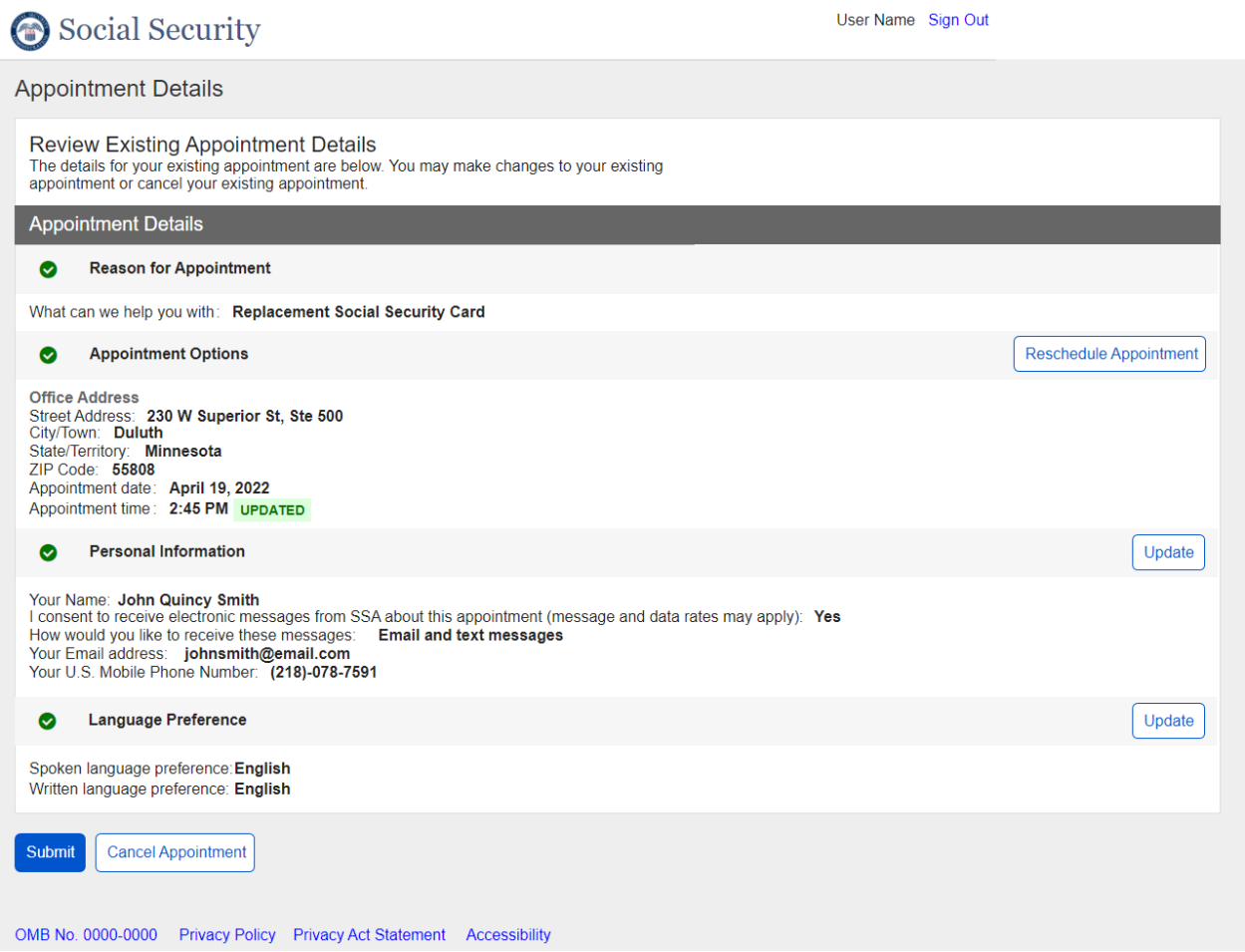


Figure 34 ESS Customer Review Existing Appointment Details Showing Updates

After making changes, customer clicks Submit to finalize the appointment.

1.3. Cancel an Appointment

Customer receives an electronic message from SSA with a link to ESS. Customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If customer opted to not receive electronic messages, customer must contact SSA to make changes.

Customer must review the Terms of Service and Privacy Act Statement before proceeding.

ESS shows Review Your Appointment Details

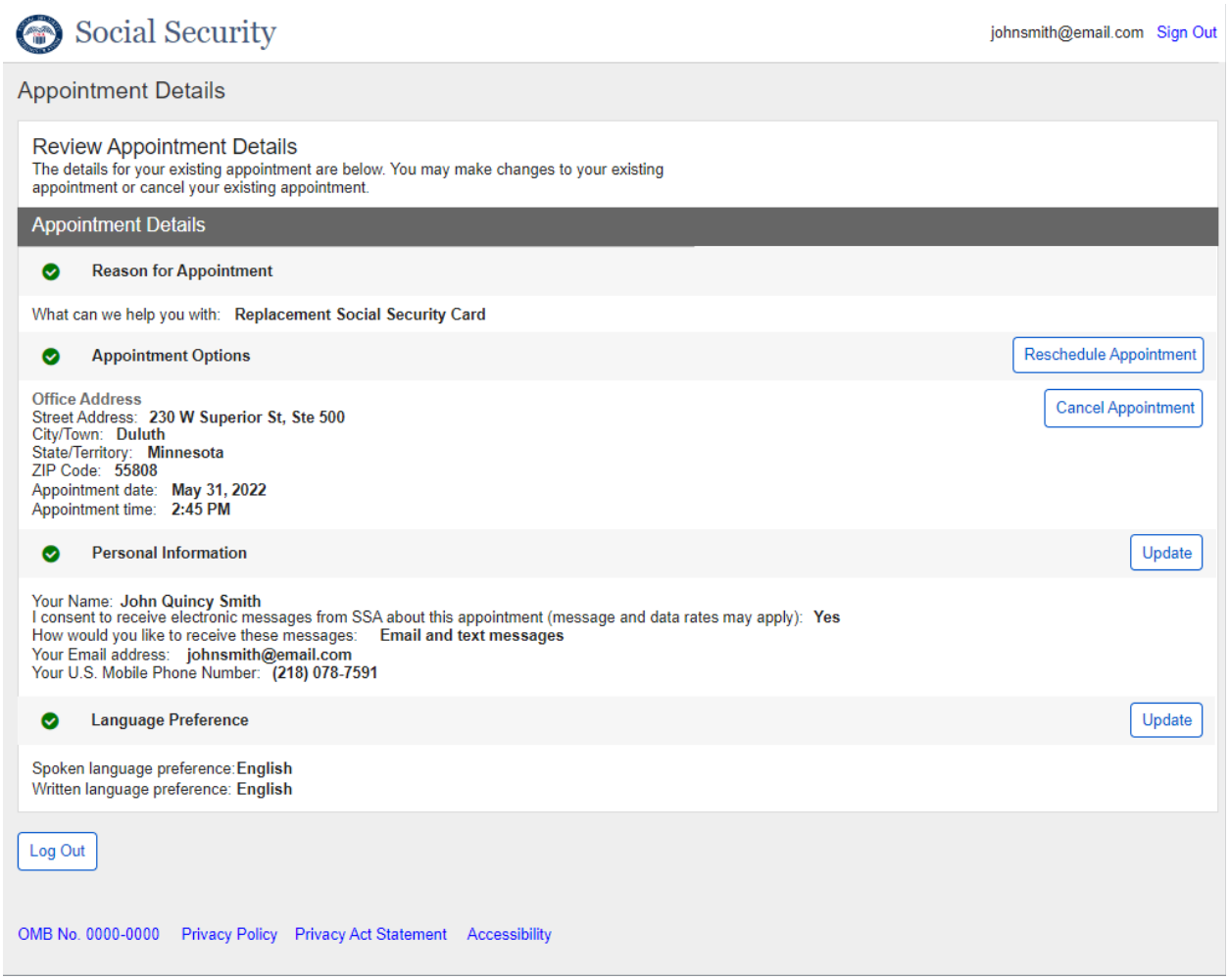


Figure 35 ESS Customer Review Existing Appointment Details

Customer clicks Cancel Appointment button to cancel the appointment. ESS asks for confirmation.

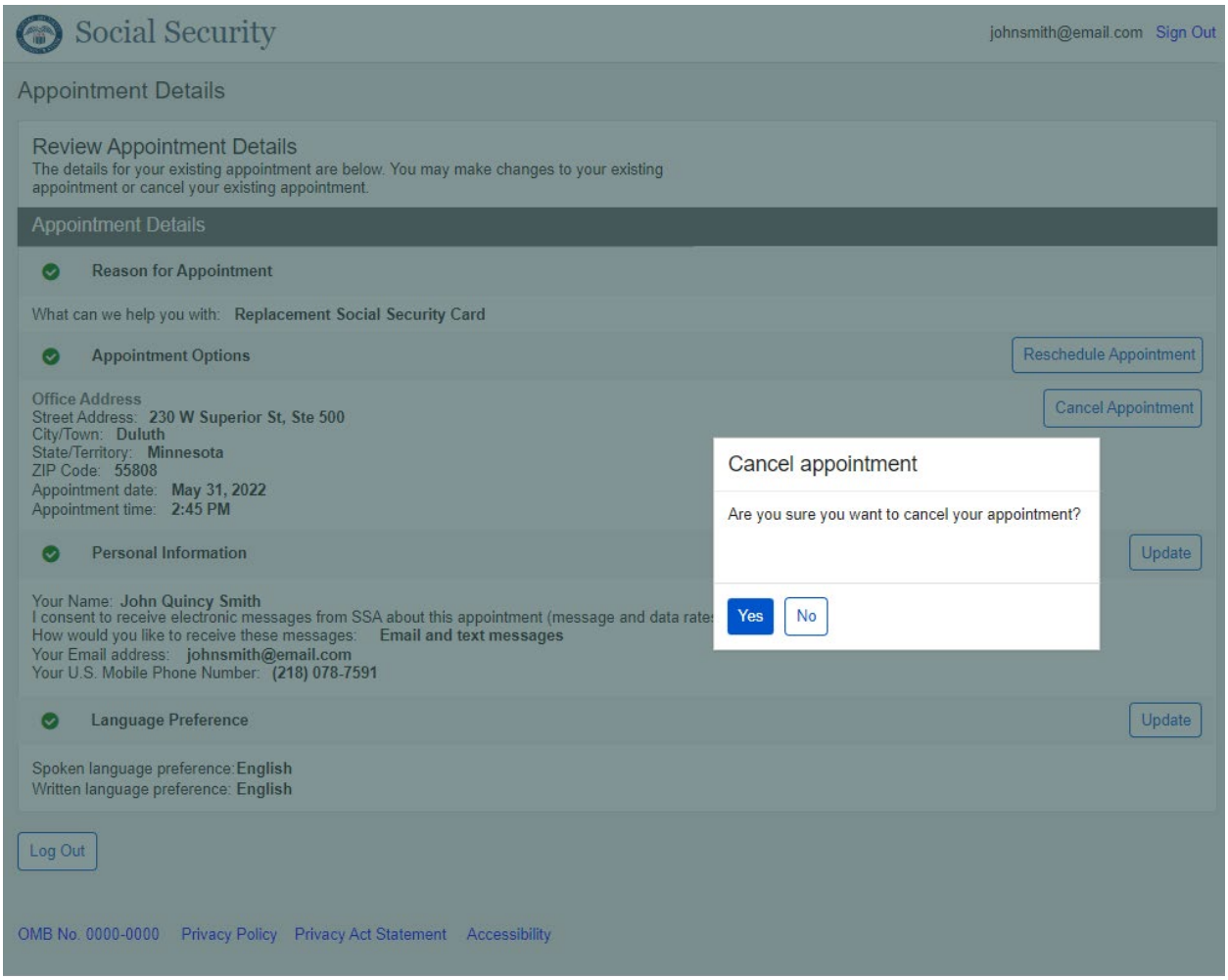


Figure 36 ESS Customer Cancel Appointment Confirmation

If Yes, ESS displays successful cancellation message.

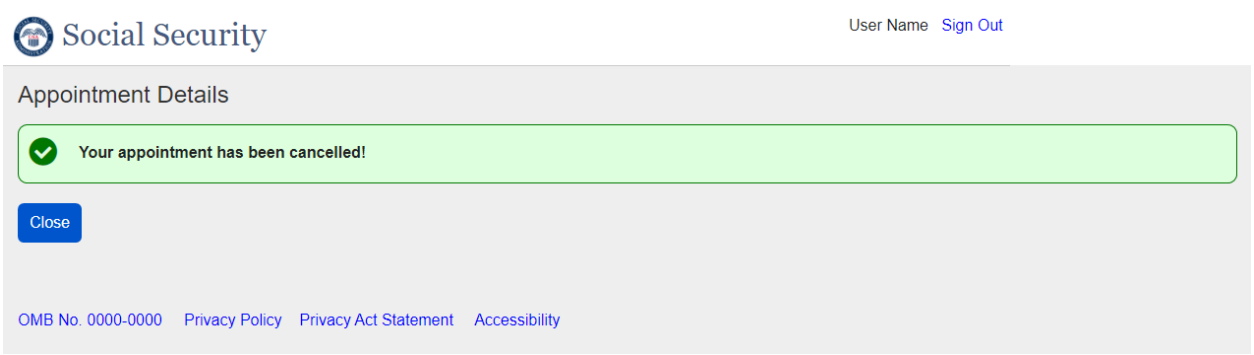


Figure 37 ESS Customer Cancel Appointment Success

If no, ESS returns the customer to Review Your Appointment Details.

2. ESS Technician Scheduling Interface Walkthrough

2.1. Schedule Appointment

The technician scheduling process begins with a phone call from a person wishing to make an appointment. The technician will verify the caller is the proper applicant from the oSSNAP application . The technician will open the Appointment function in ESS and begin to gather information from the caller.

The technician first asks for the caller's name. First and last name are required.

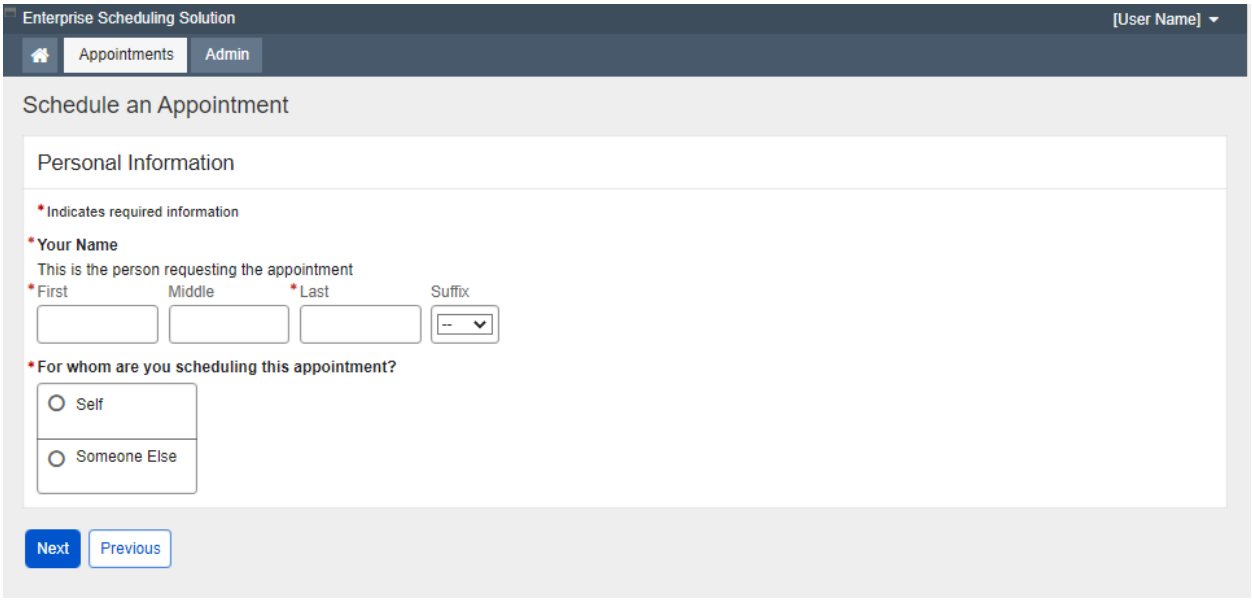


Figure 38 ESS Technician Personal Information Startup

The technician then asks for whom the caller is scheduling an appointment. The proper applicant can call and schedule an appointment. If the caller wants to schedule their own appointment, the technician asks for the caller's name and DOB (SSN is an optional field). If the caller is a proper applicant for someone else and wants to schedule an appointment, the technician asks the name and DOB (SSN is an optional field) of the number holder or original number applicant as well as the caller's name. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.

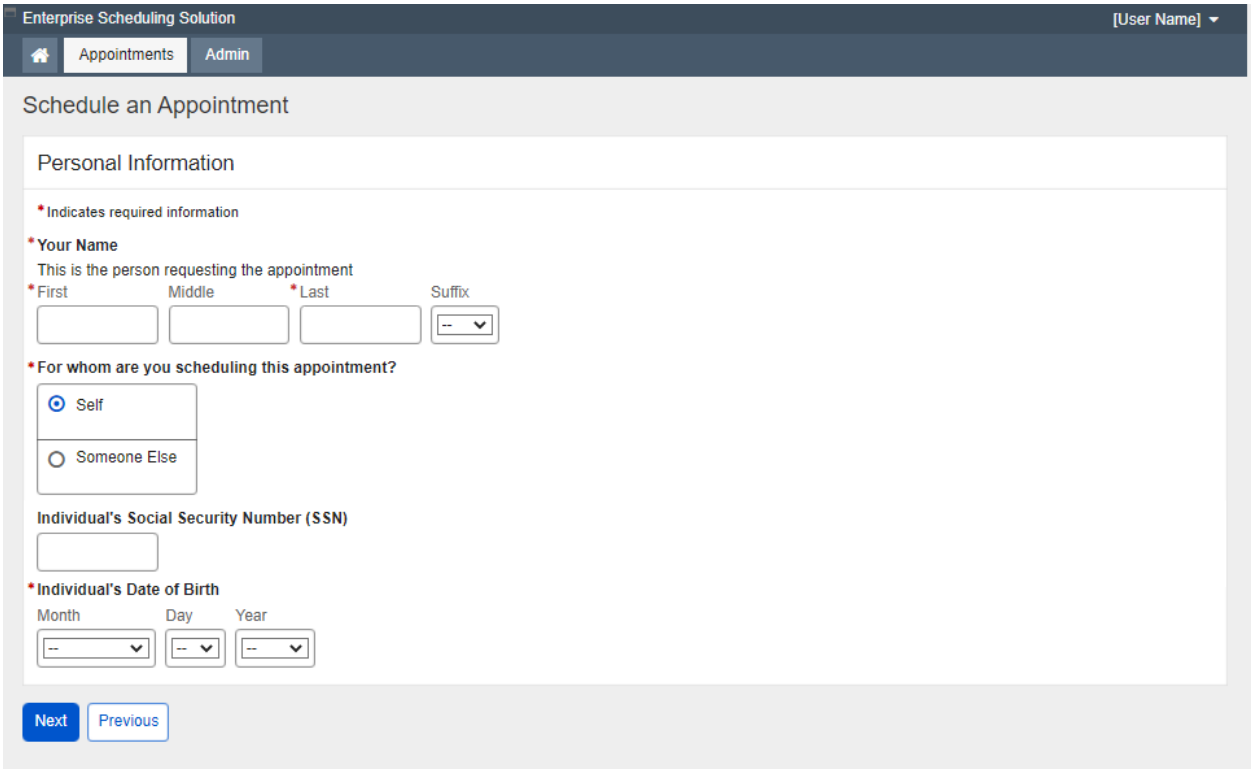


Figure 39 ESS Technician Personal Information for Self

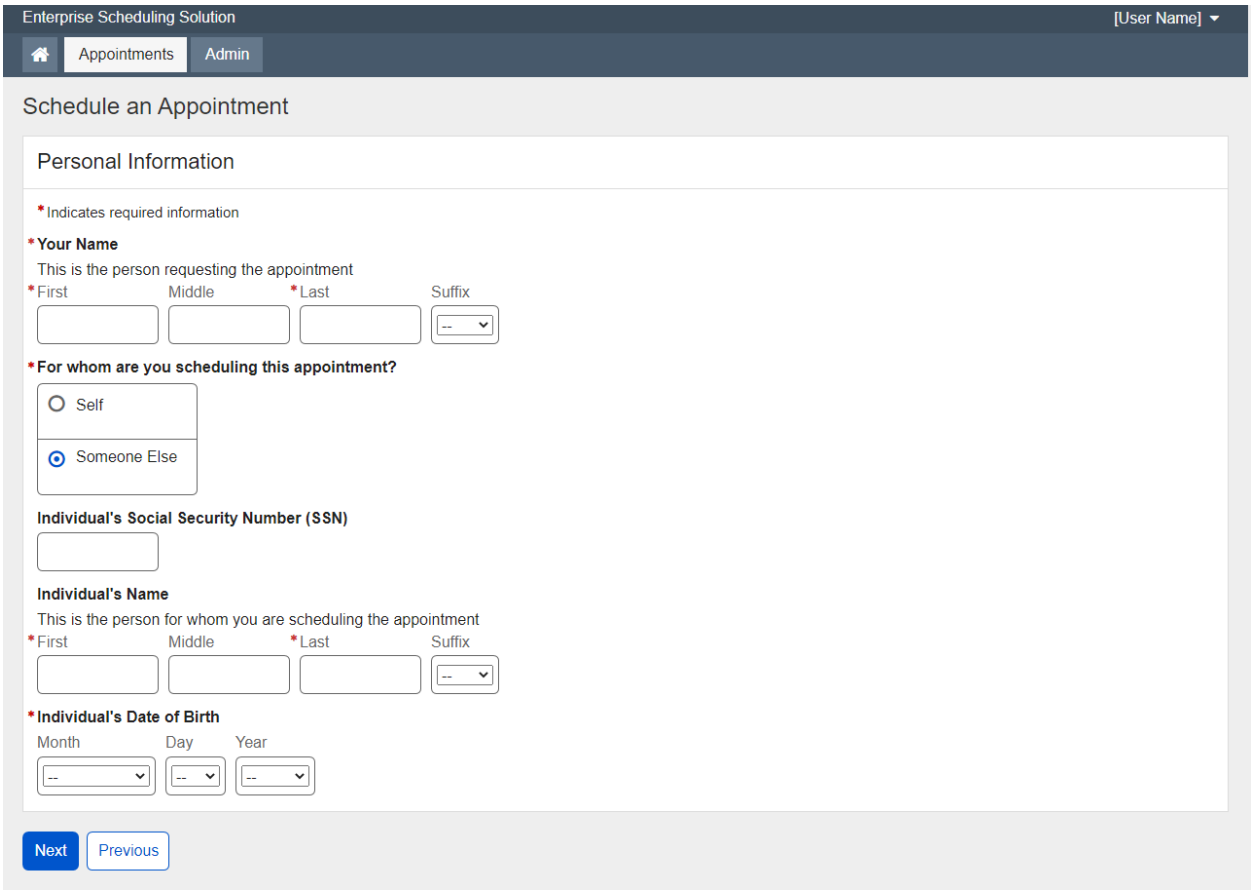


Figure 40 ESS Technician Personal Information for Someone Else

If the caller wants to schedule an appointment for someone else, the technician asks for that individual's SSN (not required), name (first and last required), and DOB. The technician clicks Next.

ESS checks the ESS database to determine if any appointments exist for the person for whom the appointment is to be made. If ESS finds any appointments, it displays a list of the appointments. The technician can then determine if the individual already has an appointment scheduled.

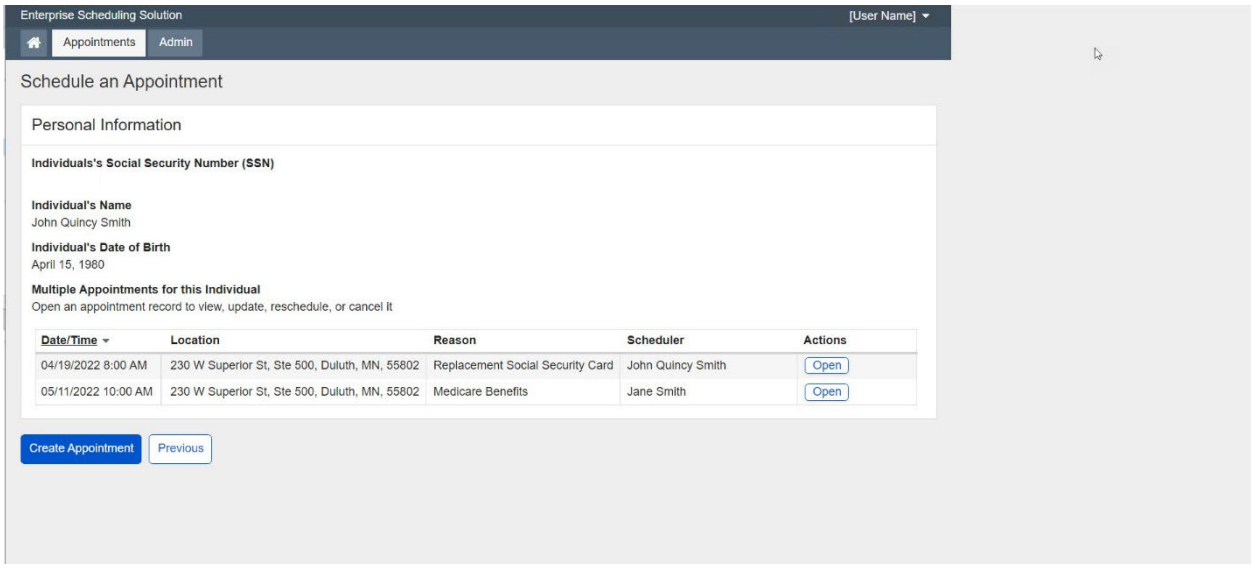


Figure 41 ESS Technician Scheduled Appointments Found

If the person for whom the appointment is to be made already has an appointment scheduled for the same reason, the technician can open the appointment to view its details and make any required changes, including rescheduling the appointment.

If no existing appointments are found, ESS displays the results page with a message indicating that no results were found.

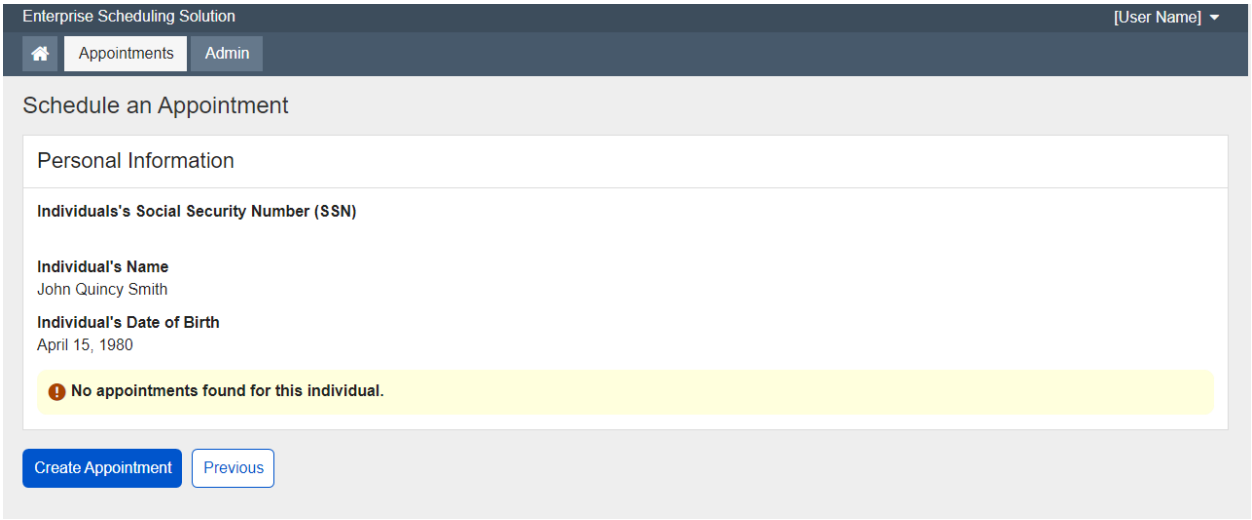


Figure 42 ESS Technician No Scheduled Appointments Found

Once the technician has gathered information about the person for whom the appointment is being made, the technician asks about the reason for the appointment.

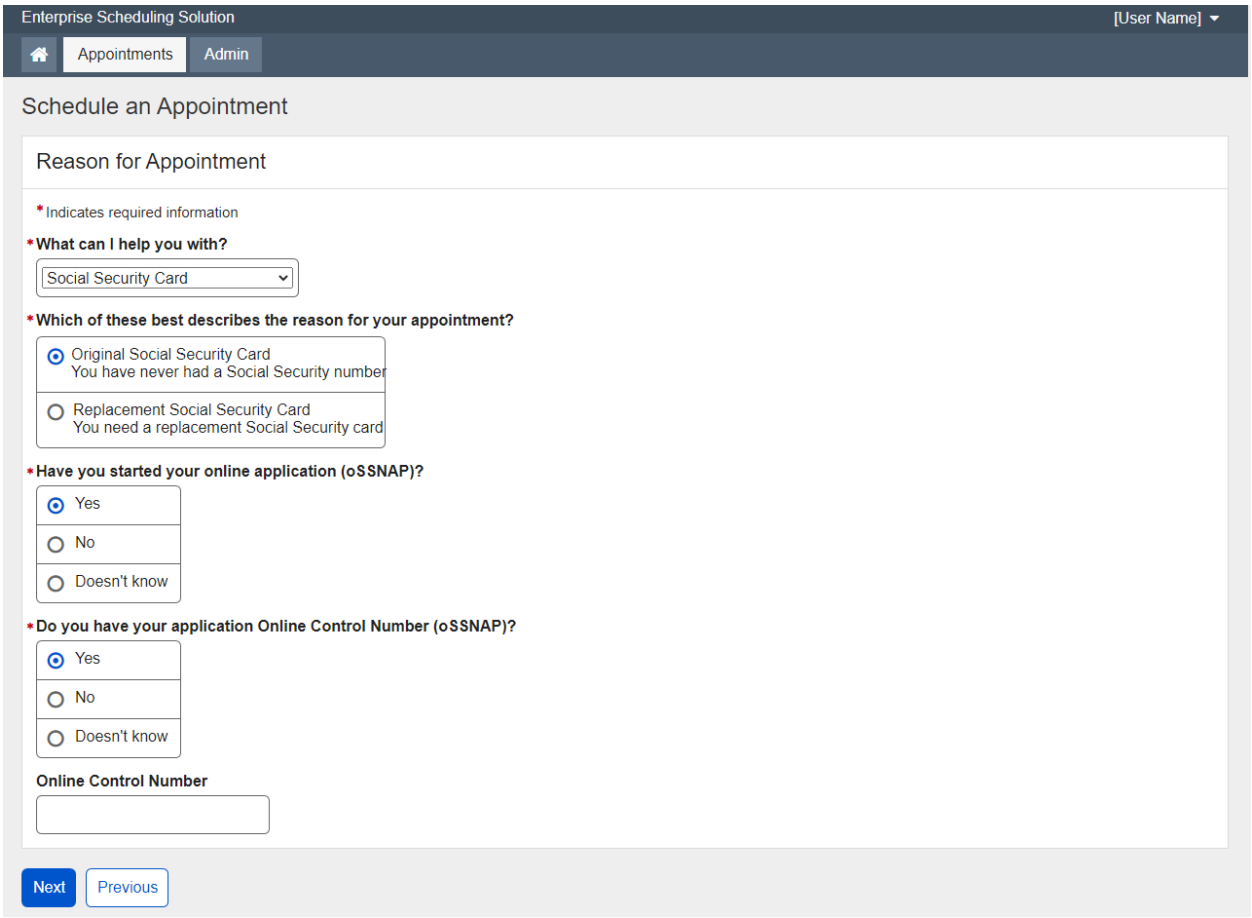


Figure 43 ESS Technician Reason for Appointment

The reason for an appointment is either to obtain a new/original SSN or a replacement Social Security card. In both cases, the technician asks if the individual has started an online application in oSSNAP.

- If Yes, ESS asks if the individual has the Online Control Number associated with the application in oSSNAP.
    - If Yes, ESS asks for the Online Control Number.
- If No or Doesn't know, the technician may continue to the next step.

  Note: Technicians will be able to select "Yes" that the customer has an Online Control number, not input the control number, and remind the customer to bring the number to their appointment if the customer does not have the number readily available.

The technician clicks Next.

ESS next asks for a ZIP code, so it can find an available appointment at the caller's local field office.

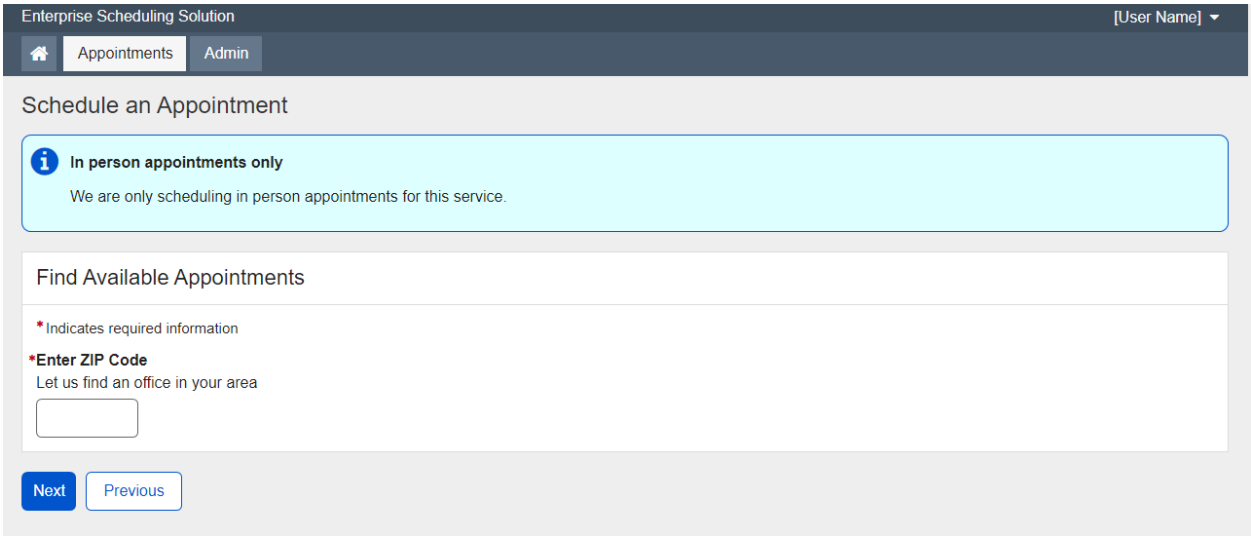


Figure 44 ESS Technician Enter ZIP Code

If the technician enters a ZIP code that ESS does not support, ESS displays a message:

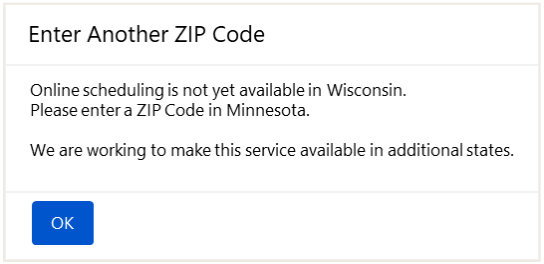


Figure 45 ESS Technician Enter Another ZIP Code

The technician reads the message to the caller and asks for a ZIP code that ESS supports. If the customer cannot complete their application in a supported field office, then the technician advises the customer of their other service options.

The technician clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.

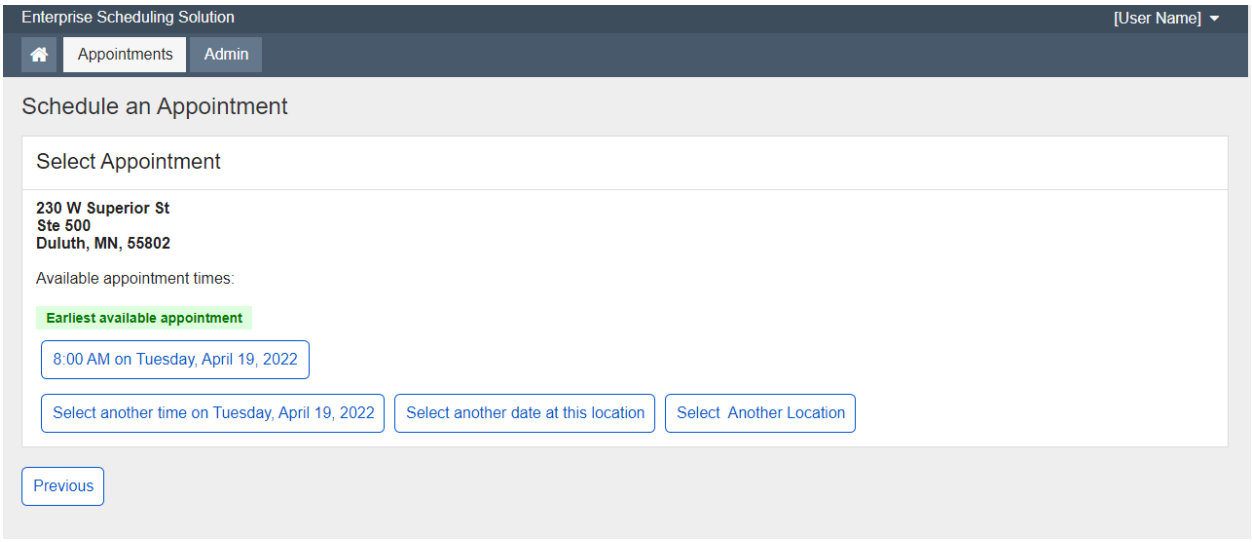


Figure 46 ESS Technician Earliest Available Appointment

The technician provides the proposed date and time to the caller (earliest date and time available).

If the caller finds the time and date acceptable, the technician clicks the button with the time and date on it and confirms the appointment.

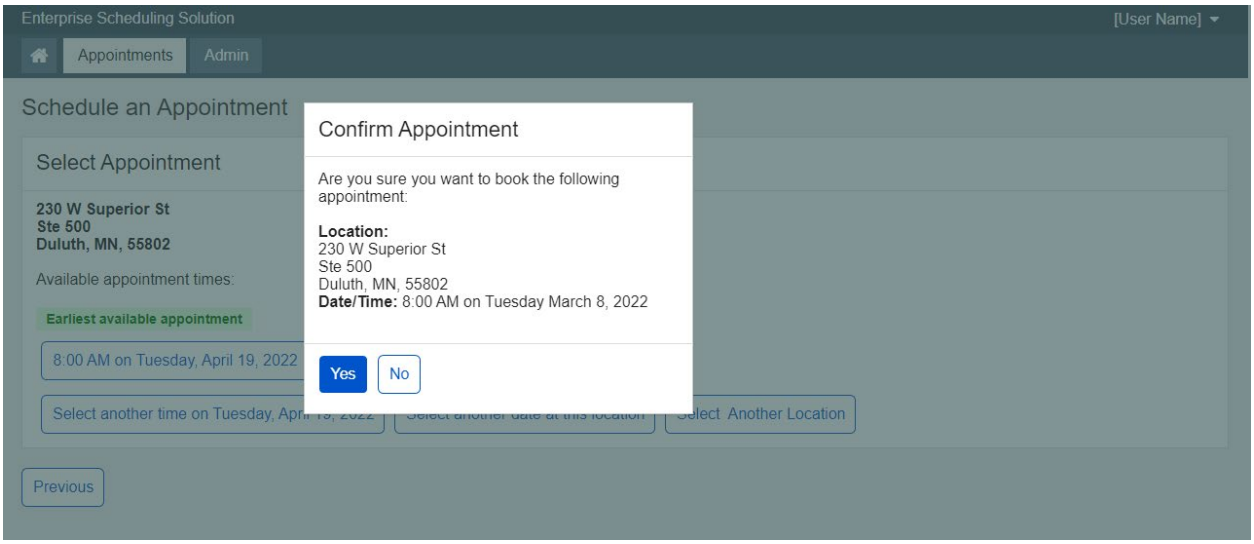


Figure 47 ESS Technician Confirm Appointment

The technician clicks Yes to continue.

For a review of the interfaces involved in finding an appointment location, date, and time, please refer to pages 9 to 21. The Public and Technician applications share similar design concepts.

The technician informs the caller that SSA can send a confirmation message, reminders, and check-in instructions for the appointment by text and email, which the caller can opt out of at any time.

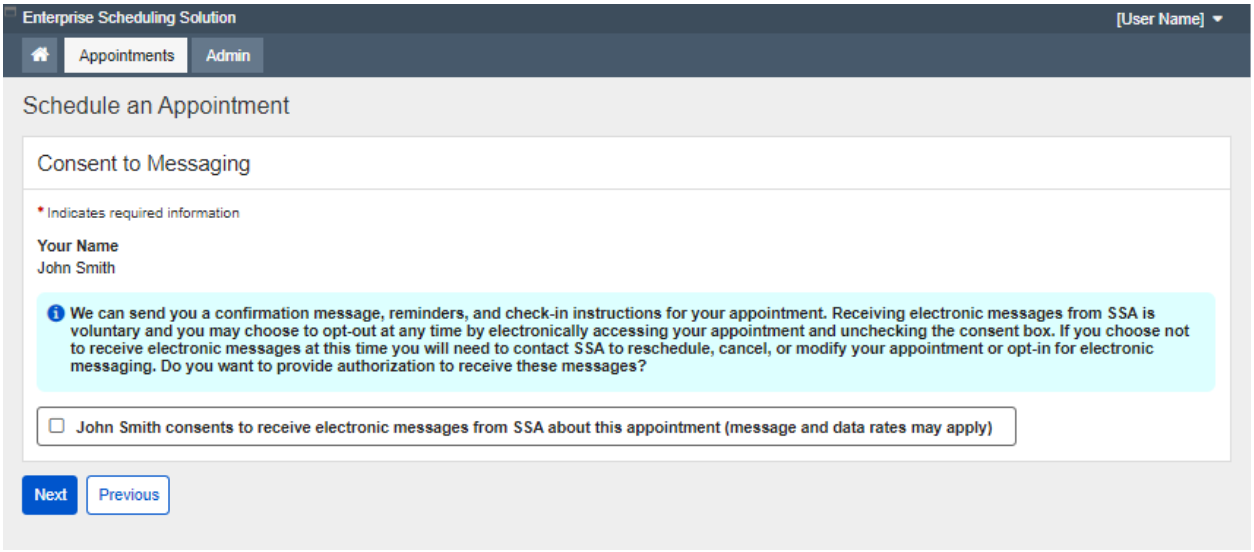


Figure 48 ESS Technician Consent to Messaging Before Consent

- If the caller does not consent to receiving electronic messages, when the technician clicks Next, a message appears to remind the individual that he or she will not receive messages about this appointment. The technician reads this message to the caller.

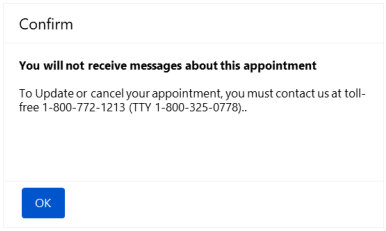


Figure 49 ESS Technician No Consent to Messaging Message

- If the caller agrees to receiving electronic messages, the technician checks the box indicating the caller's consent to the electronic messages. The technician asks how the caller would like to receive messages:
    - If the caller indicates Email, the technician asks for and enters the caller's email address.
    - If the caller indicates both Email and text messages, the technician asks for and enters the caller's email address and mobile phone number.

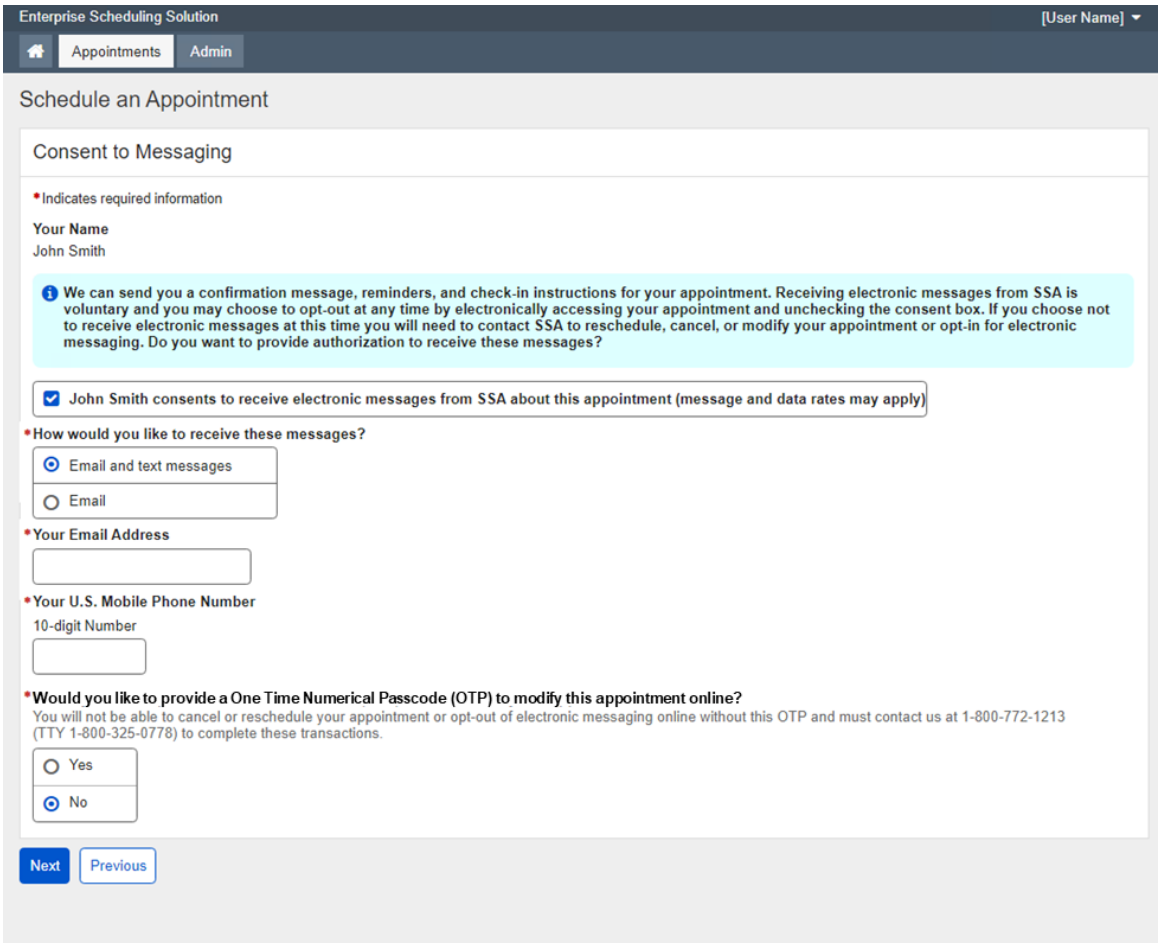


Figure 50 ESS Technician Consent to Messaging After Consent, Email and text messages, No to OTP

If the caller consents to receiving electronic messages, the technician also asks the caller to create an OTP to modify the appointment online. The caller may decline. If the caller agrees, the technician asks for a four-to-six numerical passcode, which the technician documents.

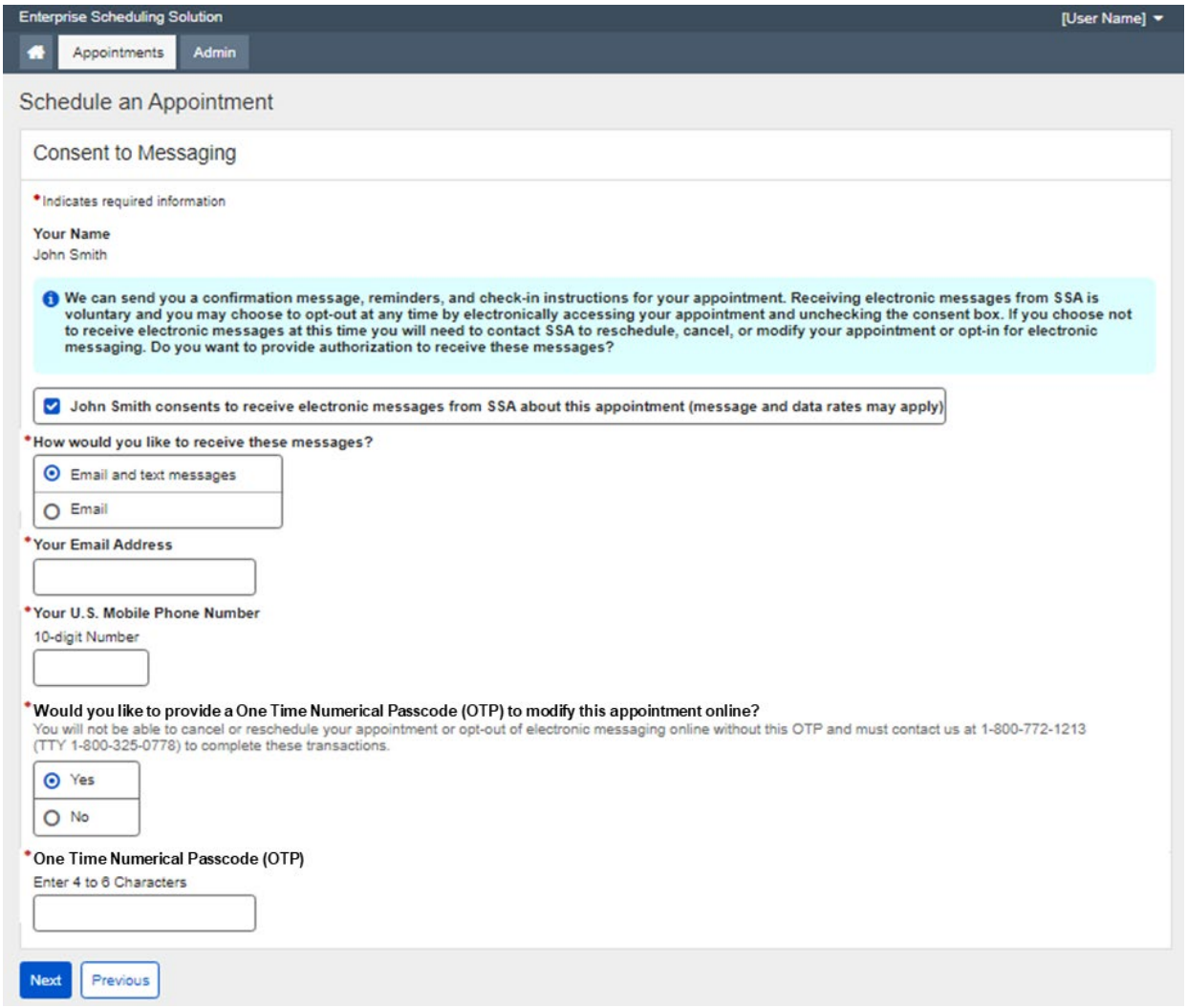


Figure 51 ESS Technician Consent to Messaging After Consent, Email and text messages, Yes to OTP

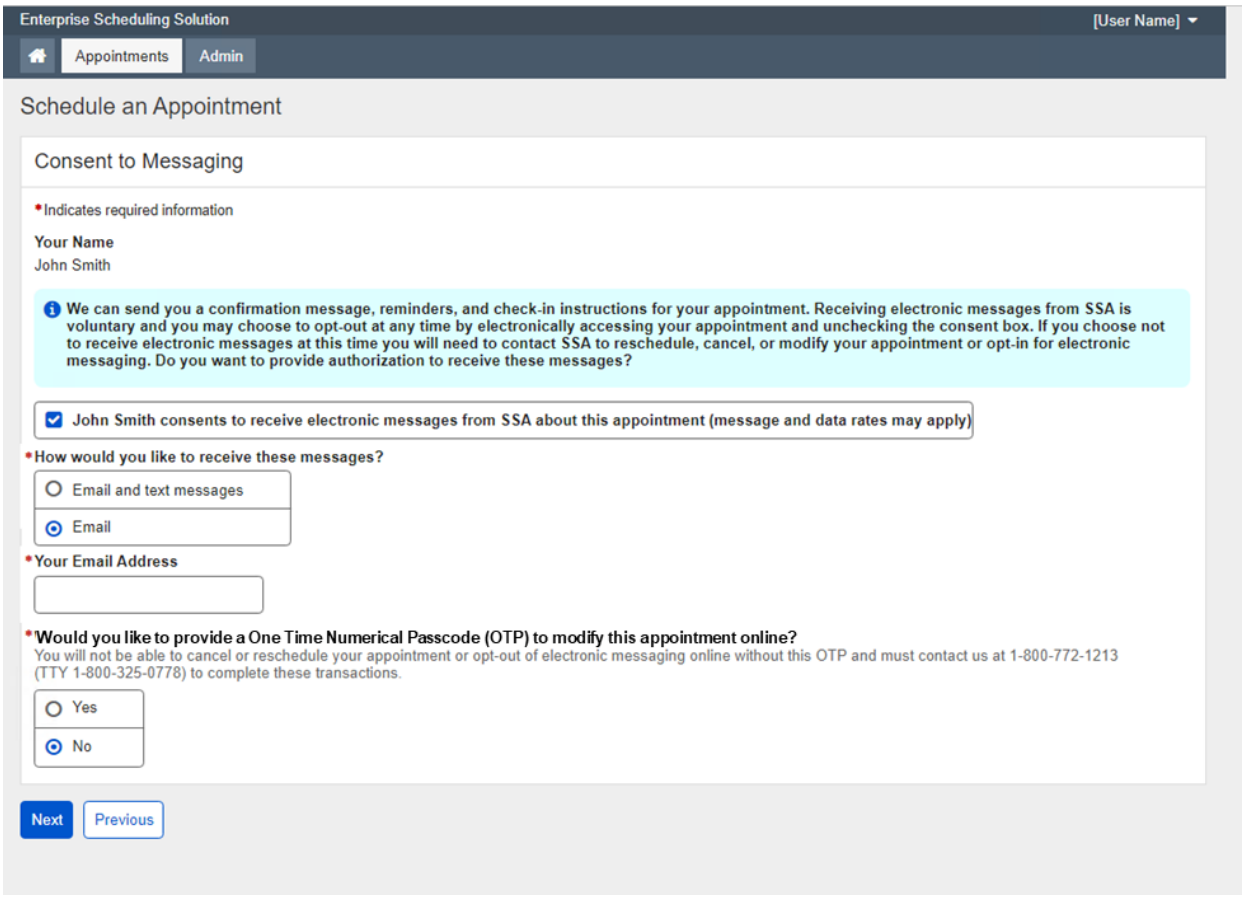


Figure 52 ESS Technician Consent to Messaging After Consent, Email only, No to OTP

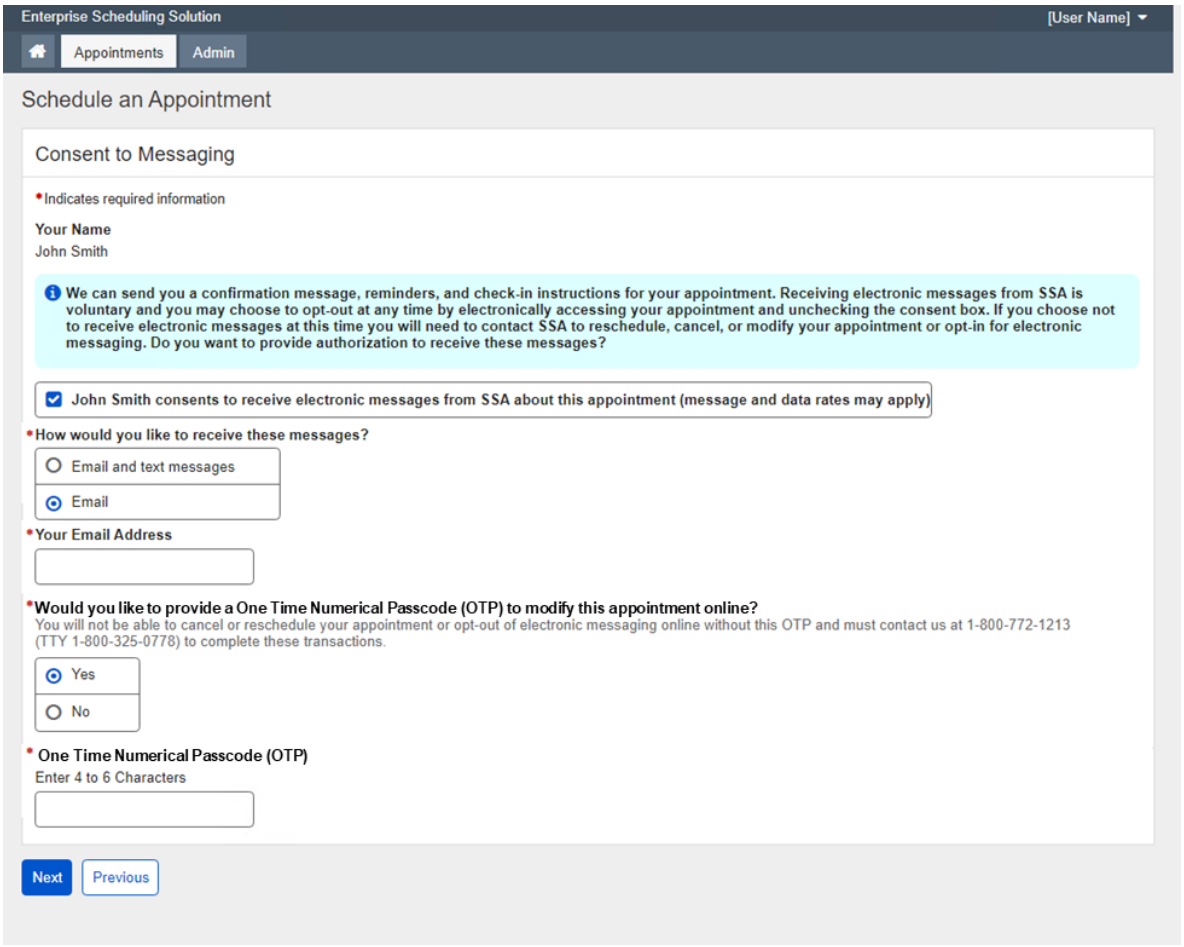


Figure 53 ESS Technician Consent to Messaging After Consent, Email only, Yes to OTP

The technician clicks Next.

ESS asks for the individual's language preferences.

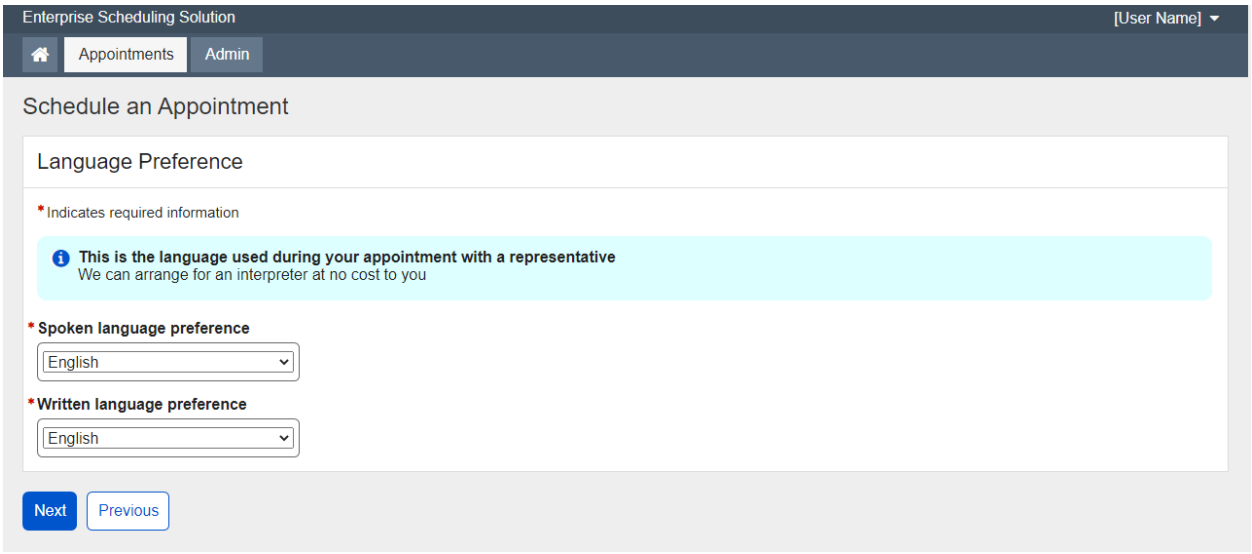


Figure 54 ESS Technician Language Preference

ESS asks for both spoken and written language preferences. Both default to English, but the technician can select another language for the individual, as needed.

The technician clicks Next to continue.

ESS asks for any remarks from the caller, individual, and/or technician. The technician may enter up to 2,500 characters. The oSSNAP Online Control Number will be added automatically to the Remarks if it was supplied in an earlier step. The remarks are locked after being entered by technicians and cannot be deleted or over keyed.

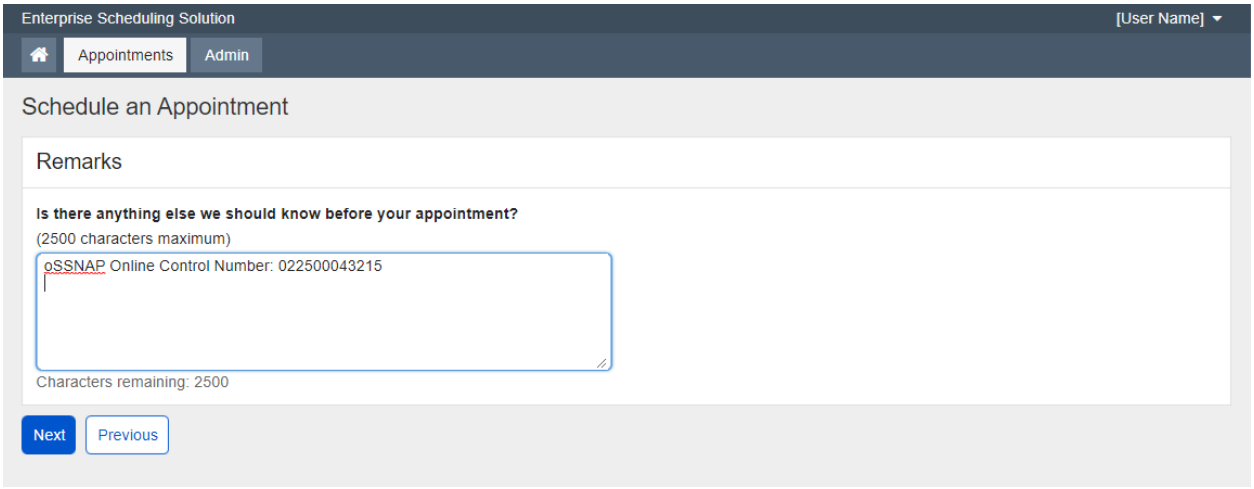


Figure 55 ESS Technician Remarks

The technician clicks Next.

ESS displays a review page, listing all the information provided about the appointment.

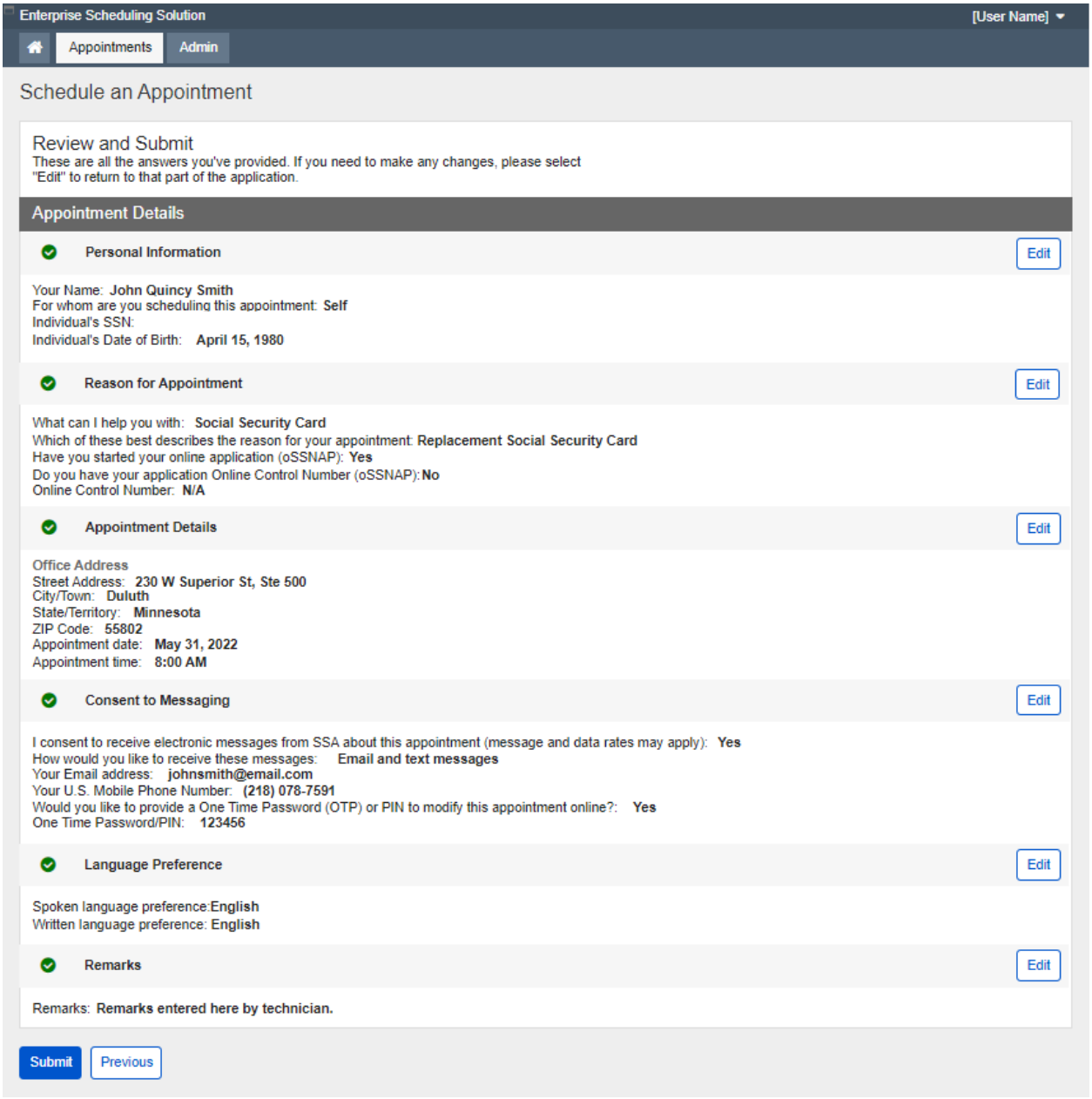


Figure 56 ESS Technician Review and Submit

The technician will review this page with the caller and edit as needed.

The Reason for Appointment Edit button returns to the Reason for Appointment step. If the technician changes the reason for the appointment, a new appointment location, date, and time, must be selected. The technician will then step through the Consent to Messaging,

Language Preferences, and Remarks pages again, with the previously entered information still there.

The Appointment Details Edit button returns to the Select Appointment – Enter ZIP Code page. ESS prefills the ZIP code with the ZIP code of the previously selected office location. The technician will use the same interfaces to find a new appointment location, date, and time for the individual. The technician will then step through the Consent to Messaging, Language Preferences, and Remarks pages again, with the previously entered information still there.

The other Edit buttons return to their respective pages in the scheduling flow.

Once satisfied with the appointment details, the technician clicks Submit to schedule the appointment.

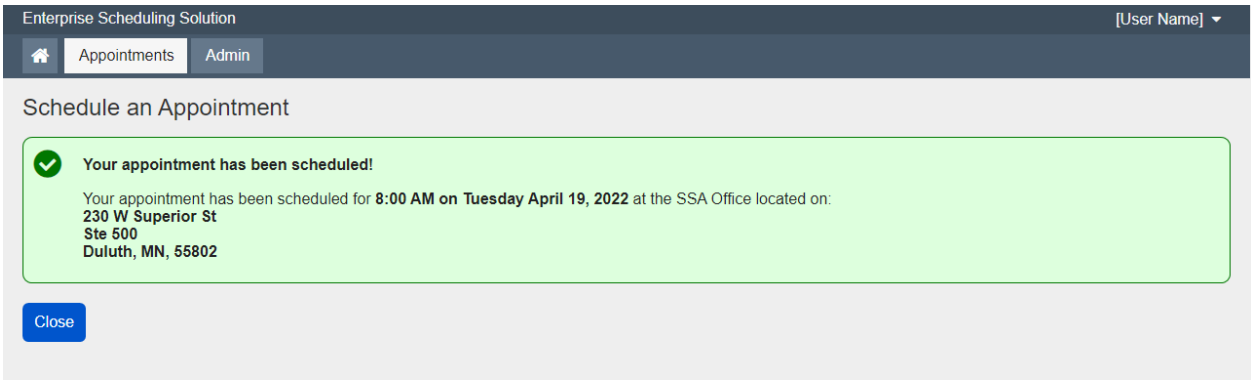


Figure 57 ESS Technician Appointment Scheduled Success

2.2. Reschedule, Modify, or Cancel an Appointment

Rescheduling, modifying, and cancelling appointments start with the technician verifying the caller is the proper applicant from oSSNAP.

The technician will open the Appointment function in ESS and begin to gather information from the caller.

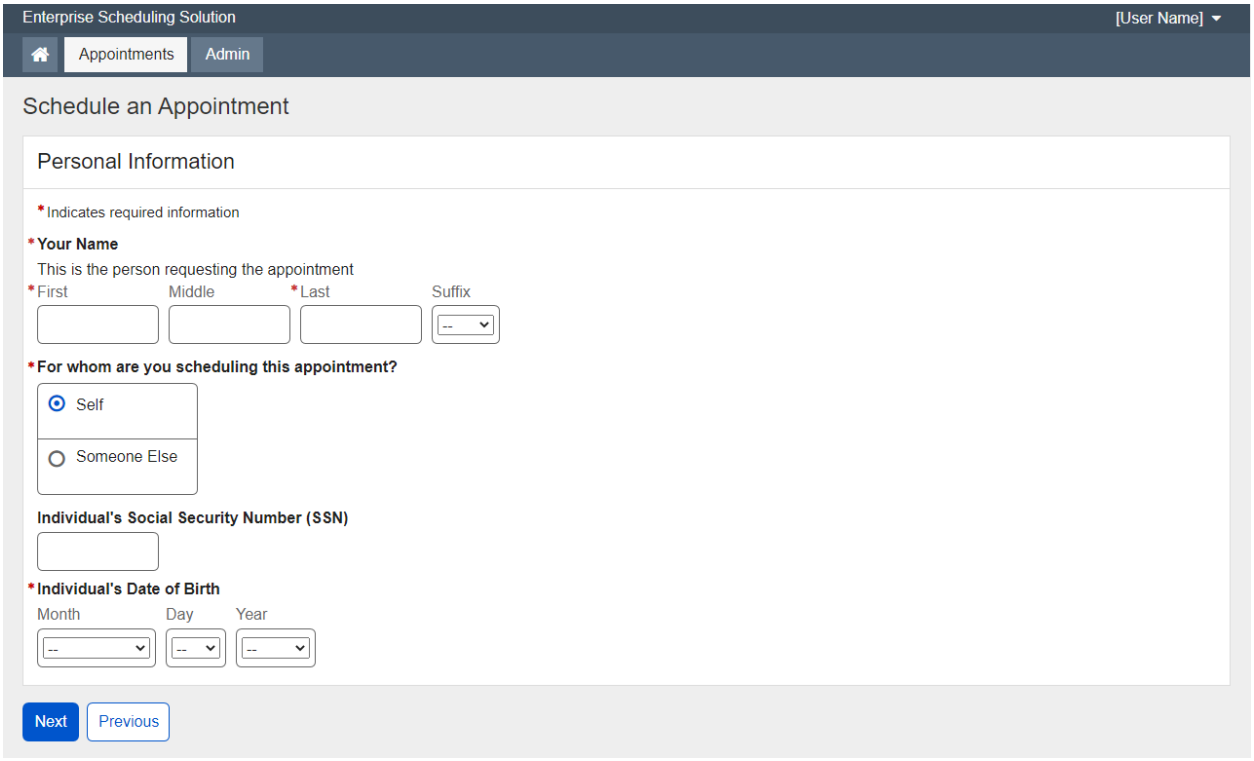


Figure 58 ESS Technician Personal Information for Scheduling for Self

The technician first asks for the caller's name. First and last name are required.

The technician then asks for whom the caller is scheduling an appointment. The caller can reschedule, modify, or cancel an appointment if the caller made the original appointment. If the caller wants to reschedule, modify, or cancel an appointment, the technician asks for the caller's SSN and DOB. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.

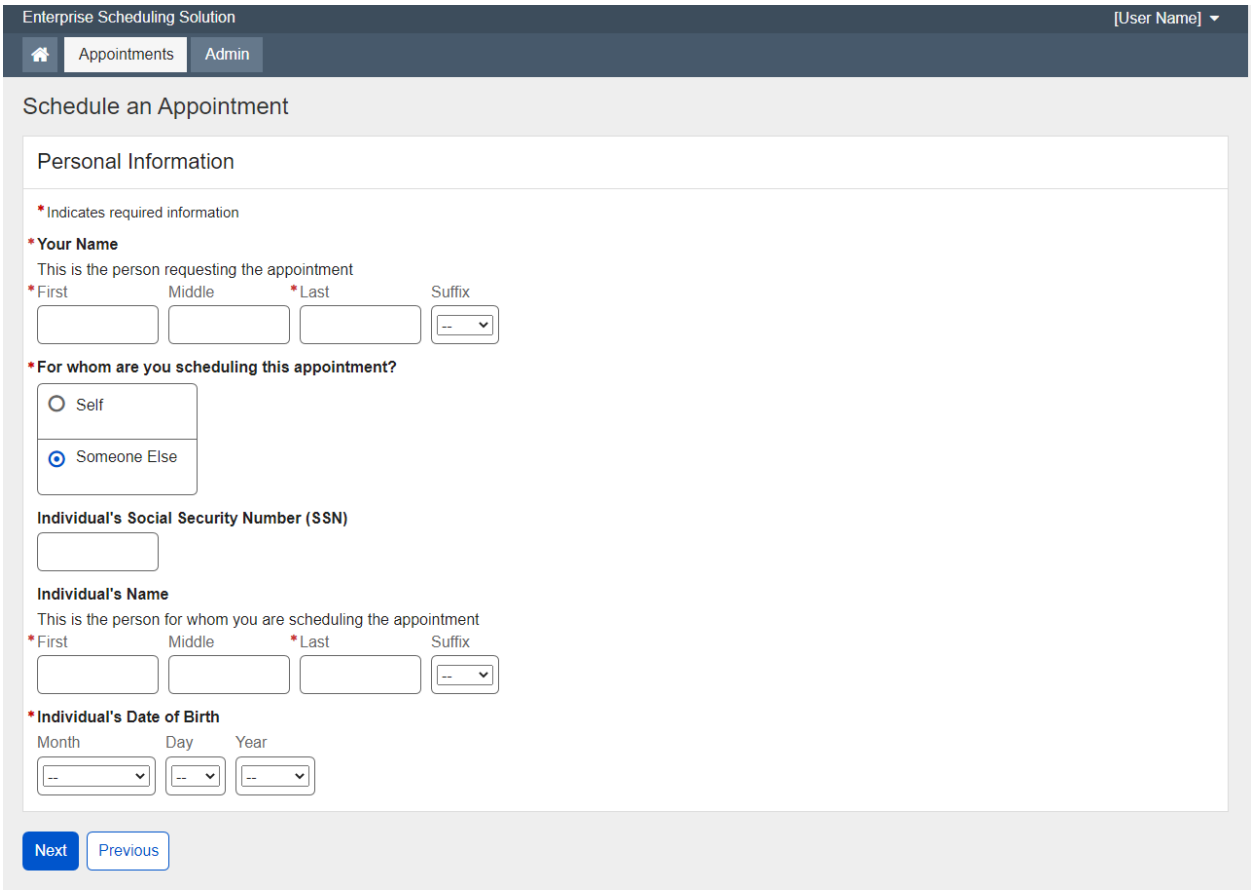


Figure 59 ESS Technician Personal Information for Someone Else

If the caller wants to reschedule, modify, or cancel an appointment for someone else, the technician asks for that individual's SSN (not required), name (first and last required), and DOB. The technician clicks Next. If the technician does not enter the required fields an error message will appear, and the technician will be unable to proceed to the next screen.

ESS checks whether other appointments have been scheduled for the person for whom the appointment was made. If ESS finds multiple appointments, it displays a list of the appointments. The technician can then determine which of the appointments is relevant to the caller.

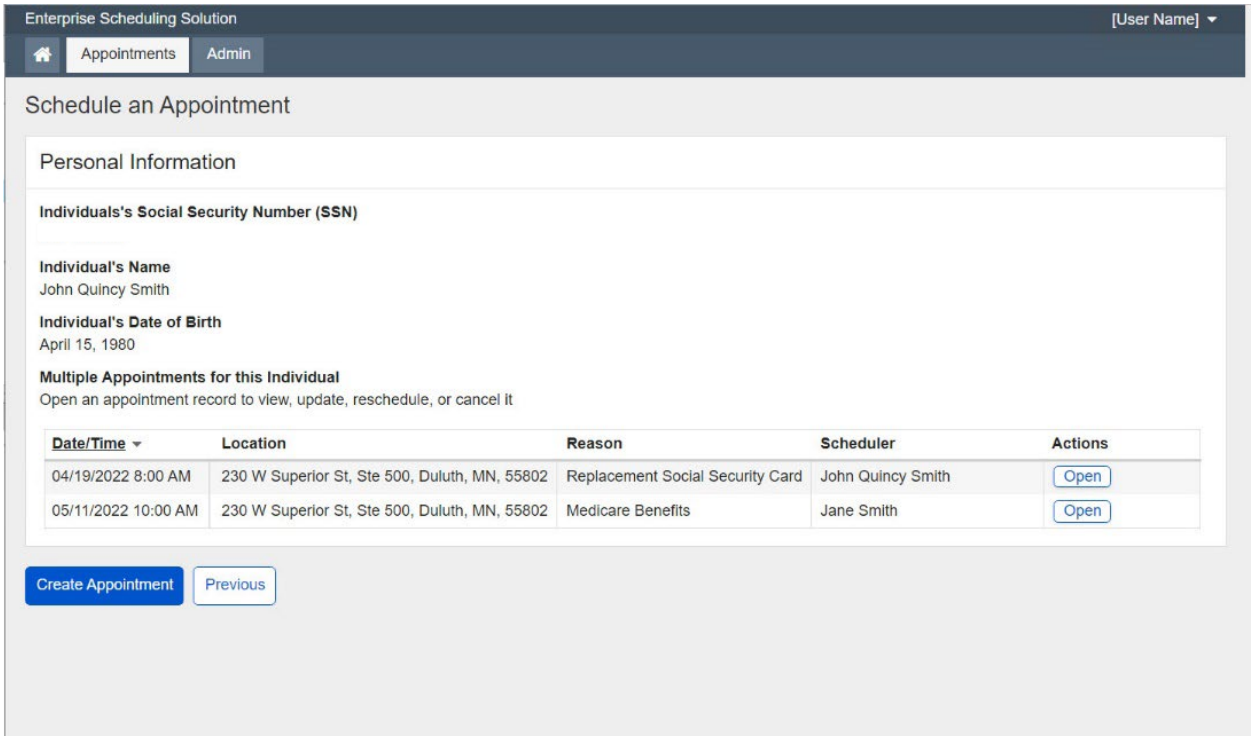


Figure 60 ESS Technician Scheduled Appointments Found

To reschedule, modify, or cancel, the technician must locate and open the appointment record. The appointment record looks similar to the Review and Submit page from the scheduling process, except instead of Edit buttons, there are Update buttons and a Reschedule button.

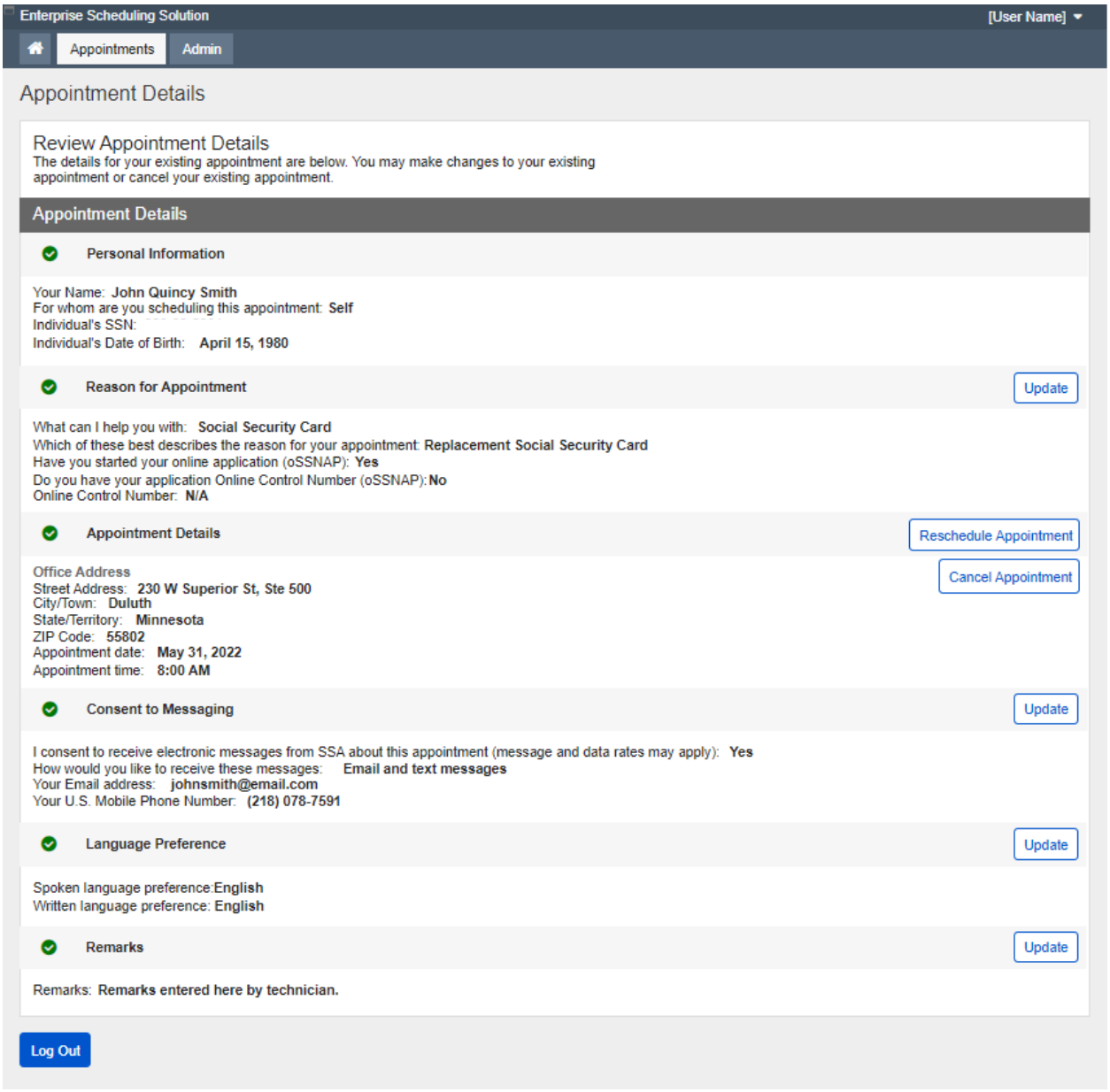


Figure 61 ESS Technician Review Existing Appointment Details

To update any of the information, the technician clicks the Update button to revisit that section of the scheduling process.

To reschedule the appointment, the technician clicks Reschedule Appointment, which revisits the Select Appointment – Enter ZIP Code page. As when editing the original appointment, ESS prefills the ZIP code with the ZIP code of the previously selected office location. The technician will use the same interfaces to find a new appointment location, date, and time for the individual.

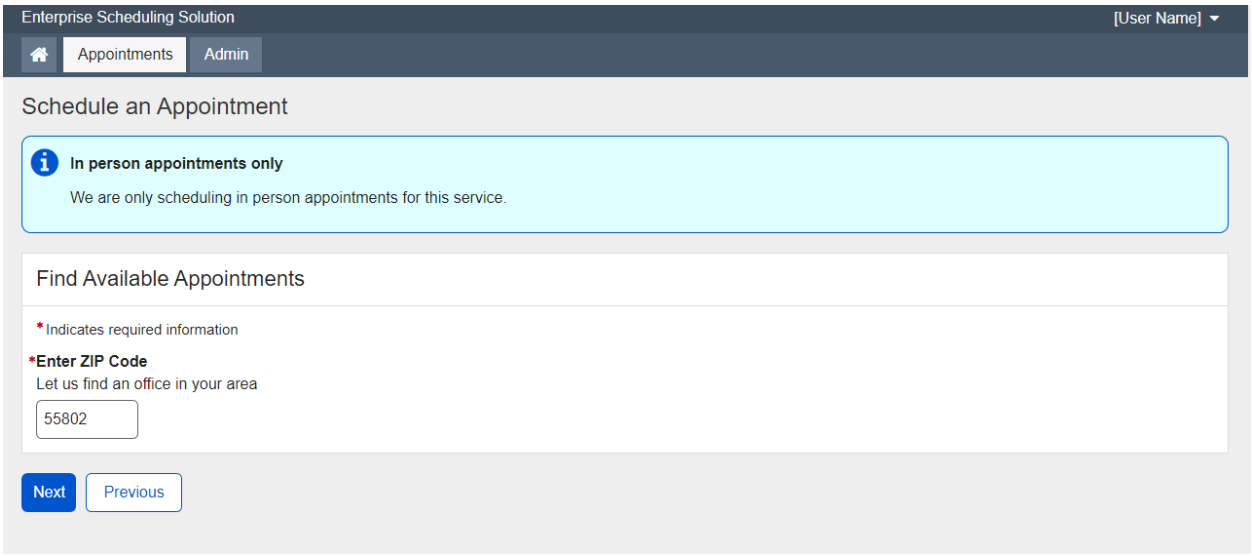


Figure 62 ESS Technician Enter ZIP Code

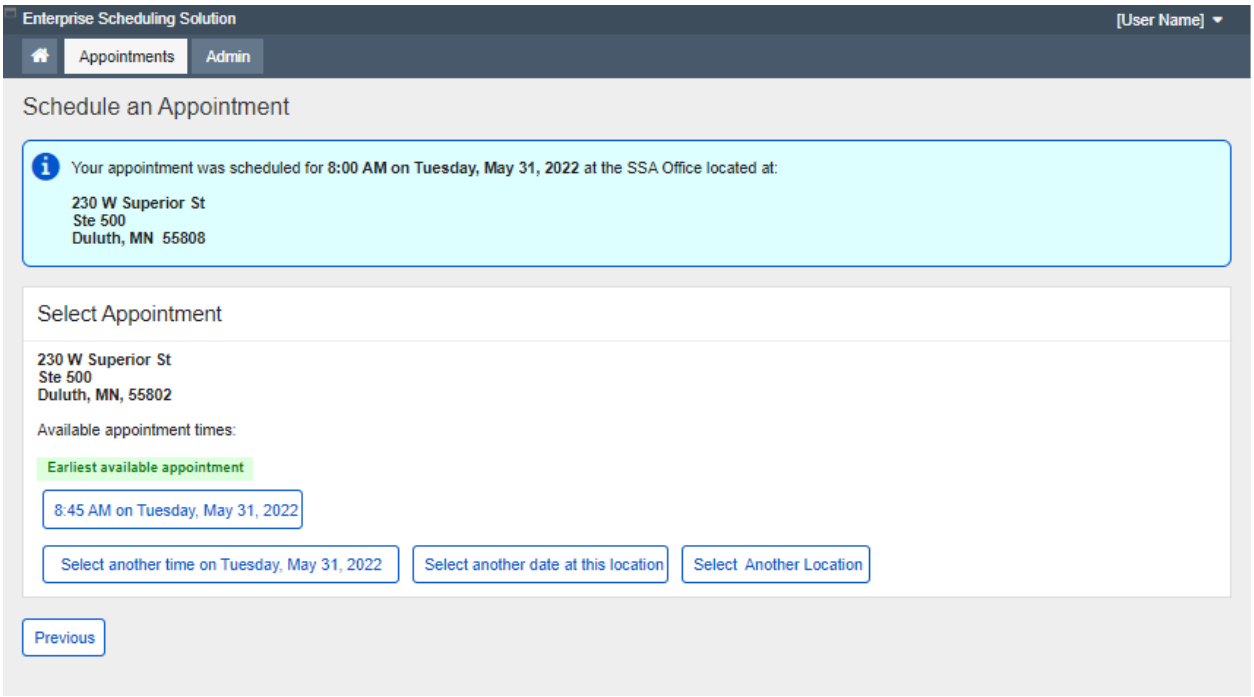


Figure 63 ESS Technician Earliest Available Appointment

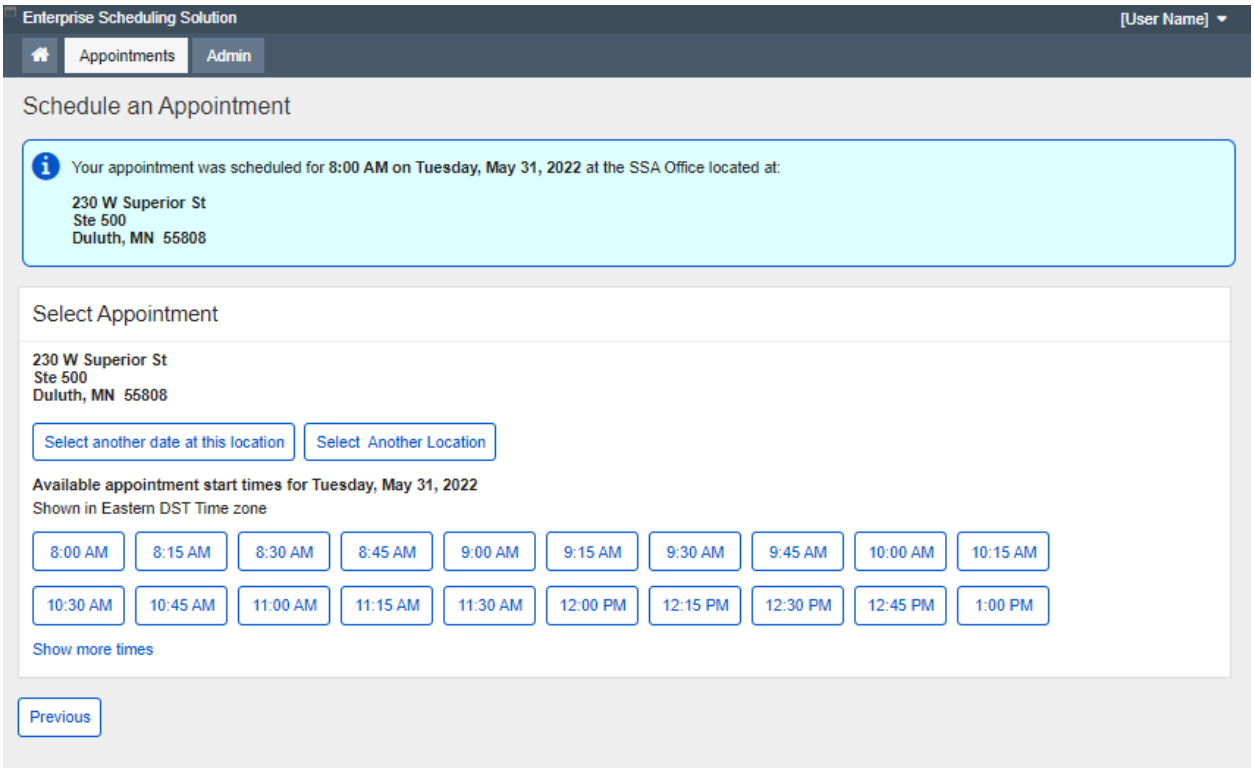


Figure 64 ESS Technician Select Another Appointment on Same Date at Same Location

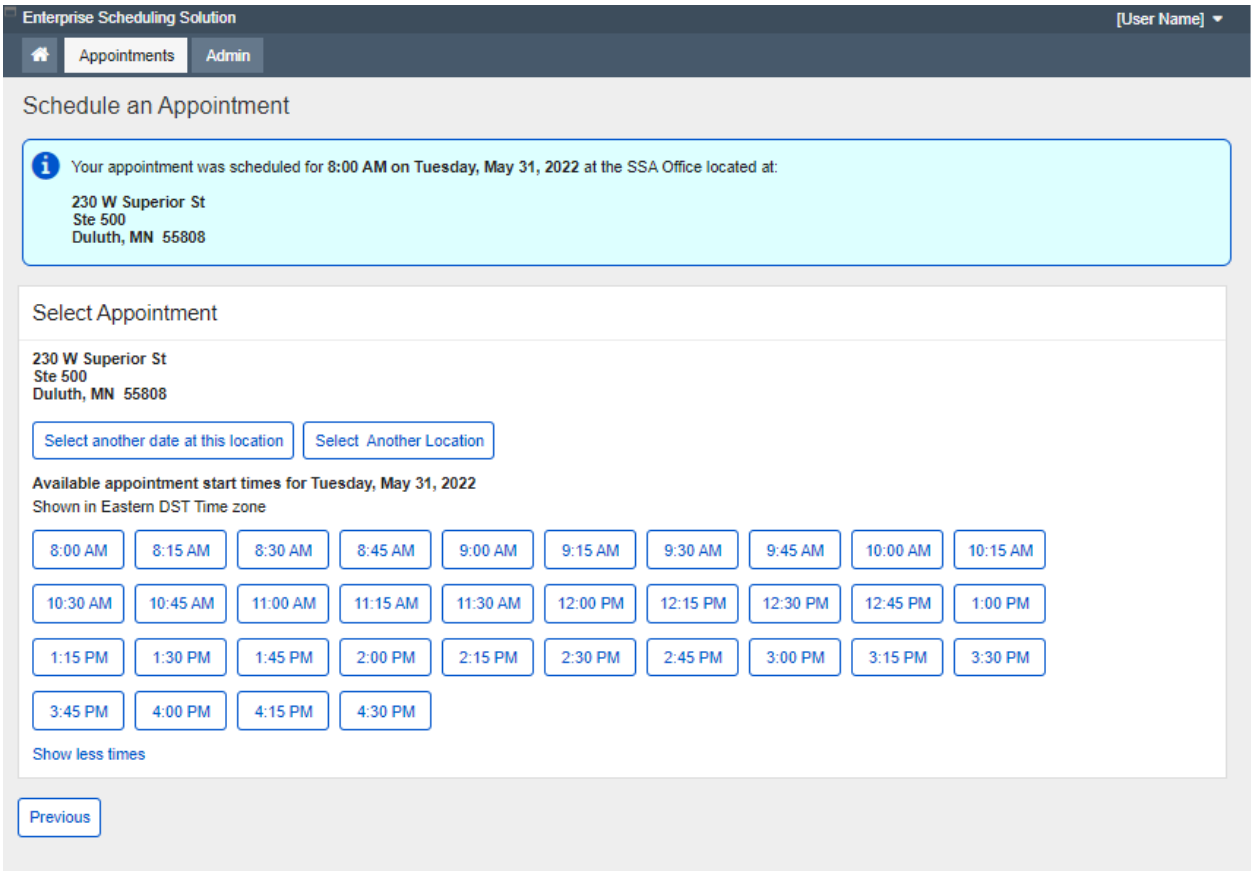


Figure 65 ESS Technician Show More Times

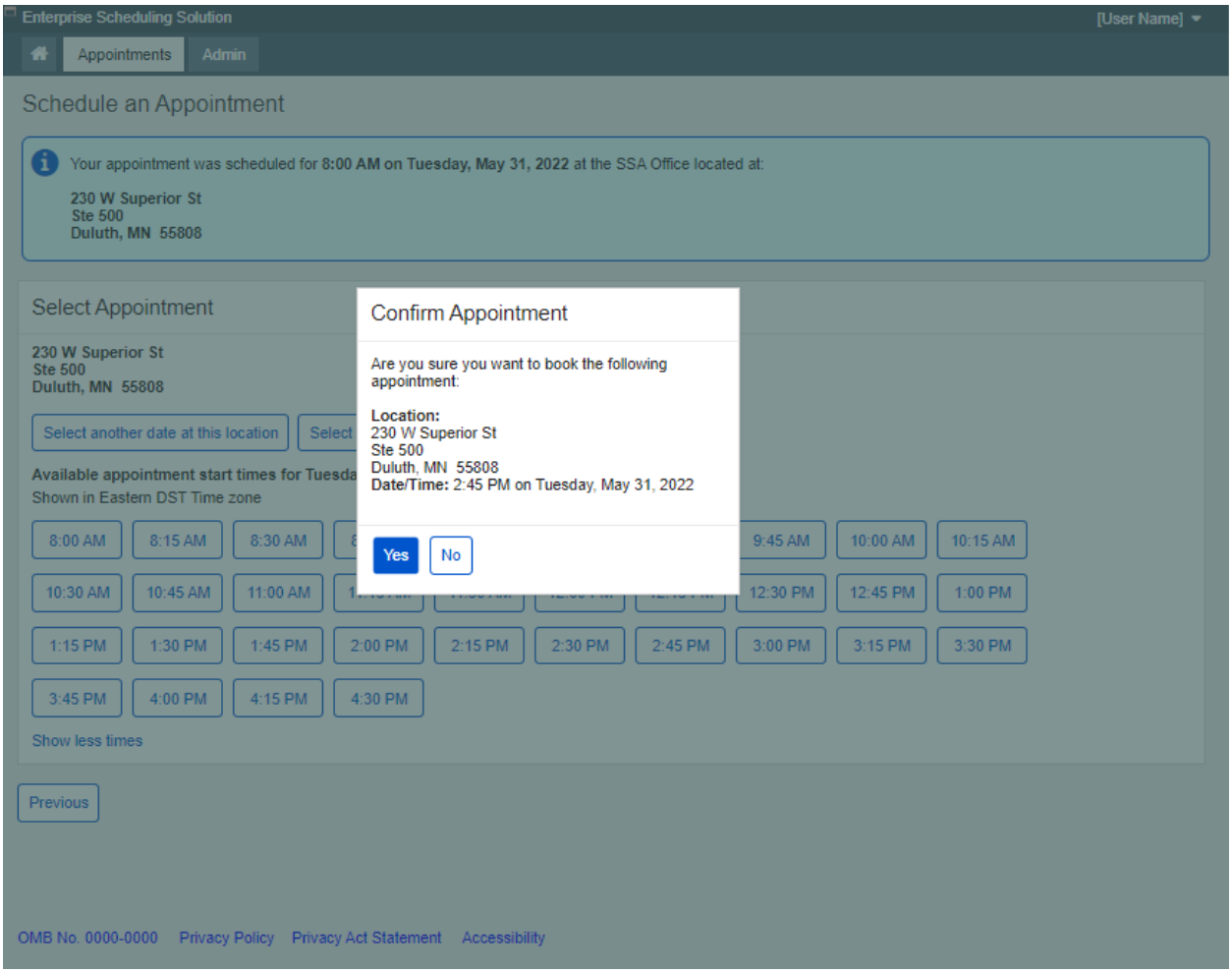


Figure 66 ESS Technician Confirm Appointment

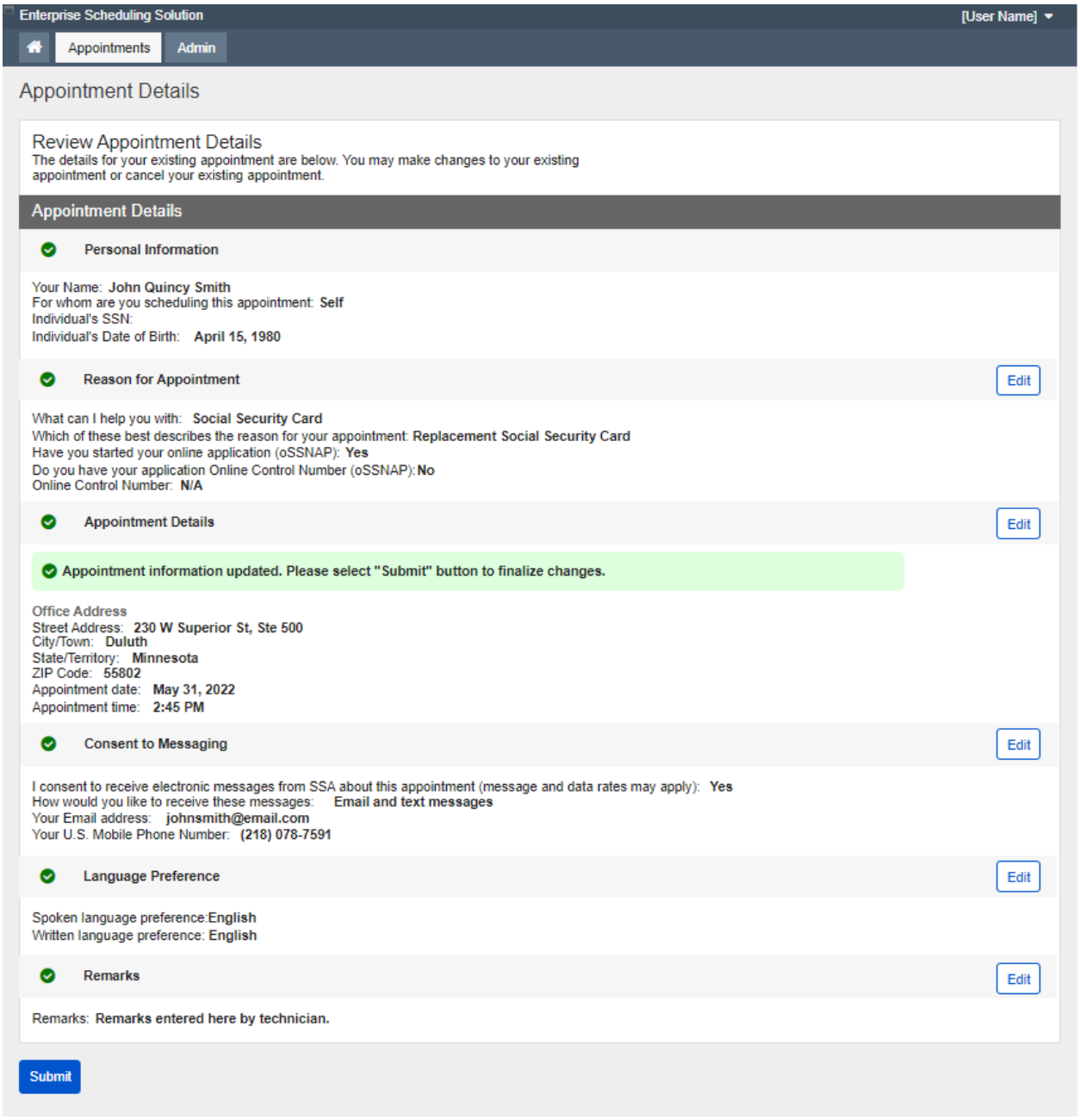


Figure 67 ESS Technician Review Appointment Details Showing Updates

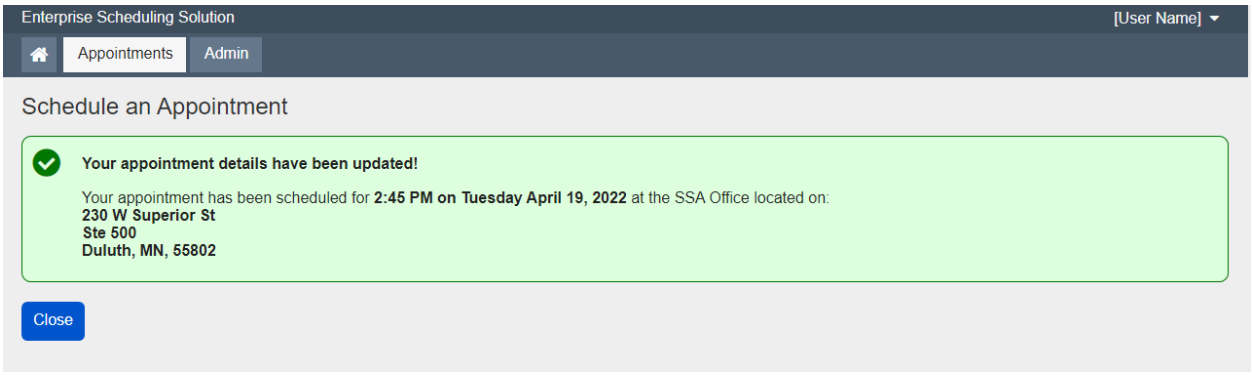


Figure 68 ESS Technician Appointment Updated Success

To cancel the appointment, the technician clicks the Cancel Appointment button at the bottom of the page. ESS asks for confirmation and presents a successful cancellation message at the end.

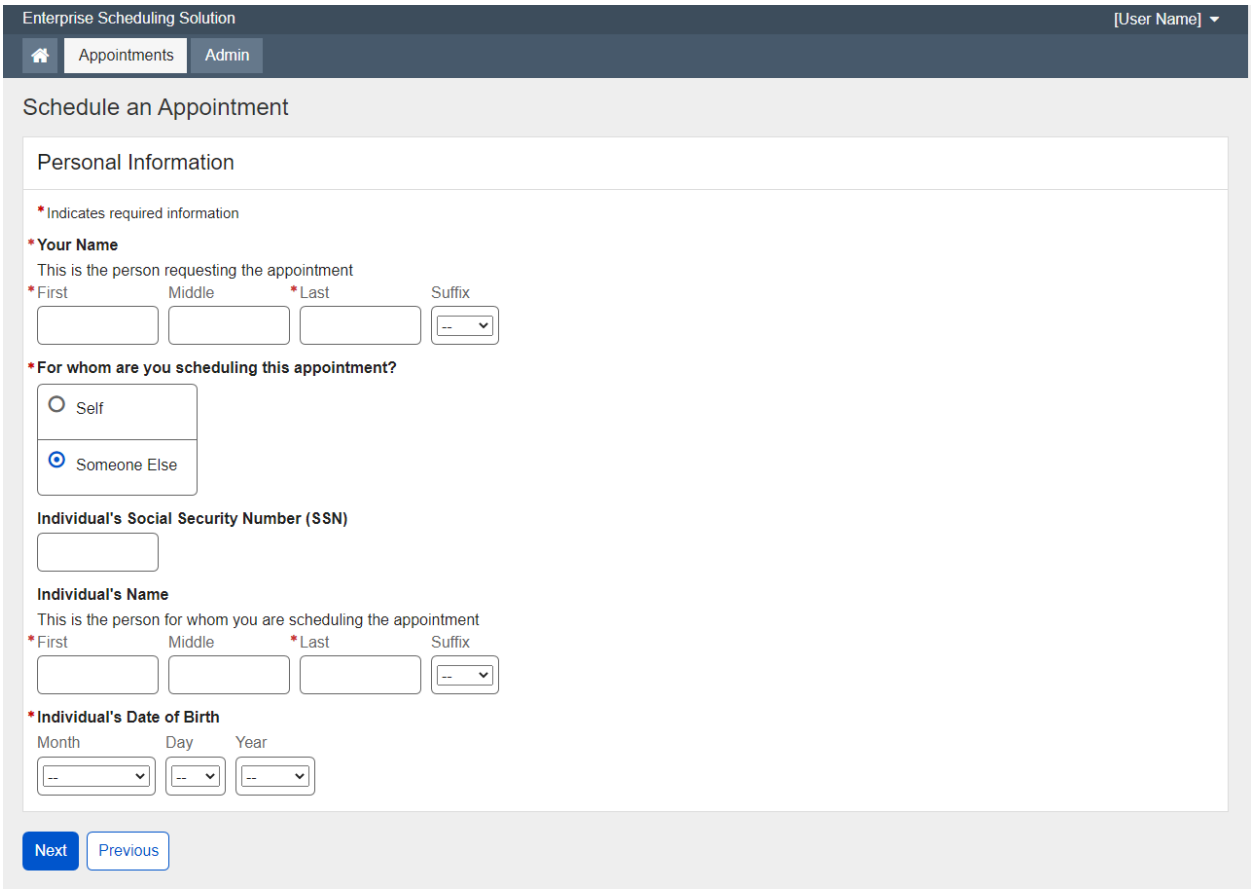


Figure 69 ESS Technician Personal Information for Someone Else

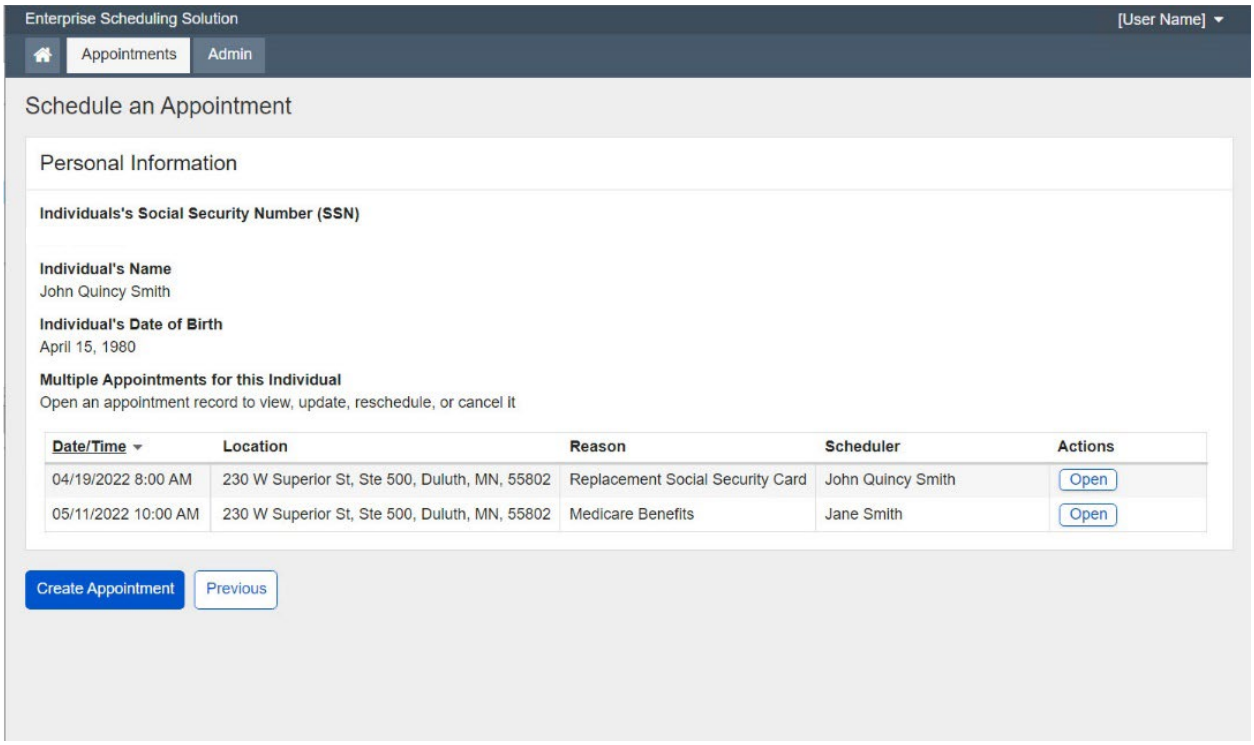


Figure 70 ESS Technician Scheduled Appointments Found

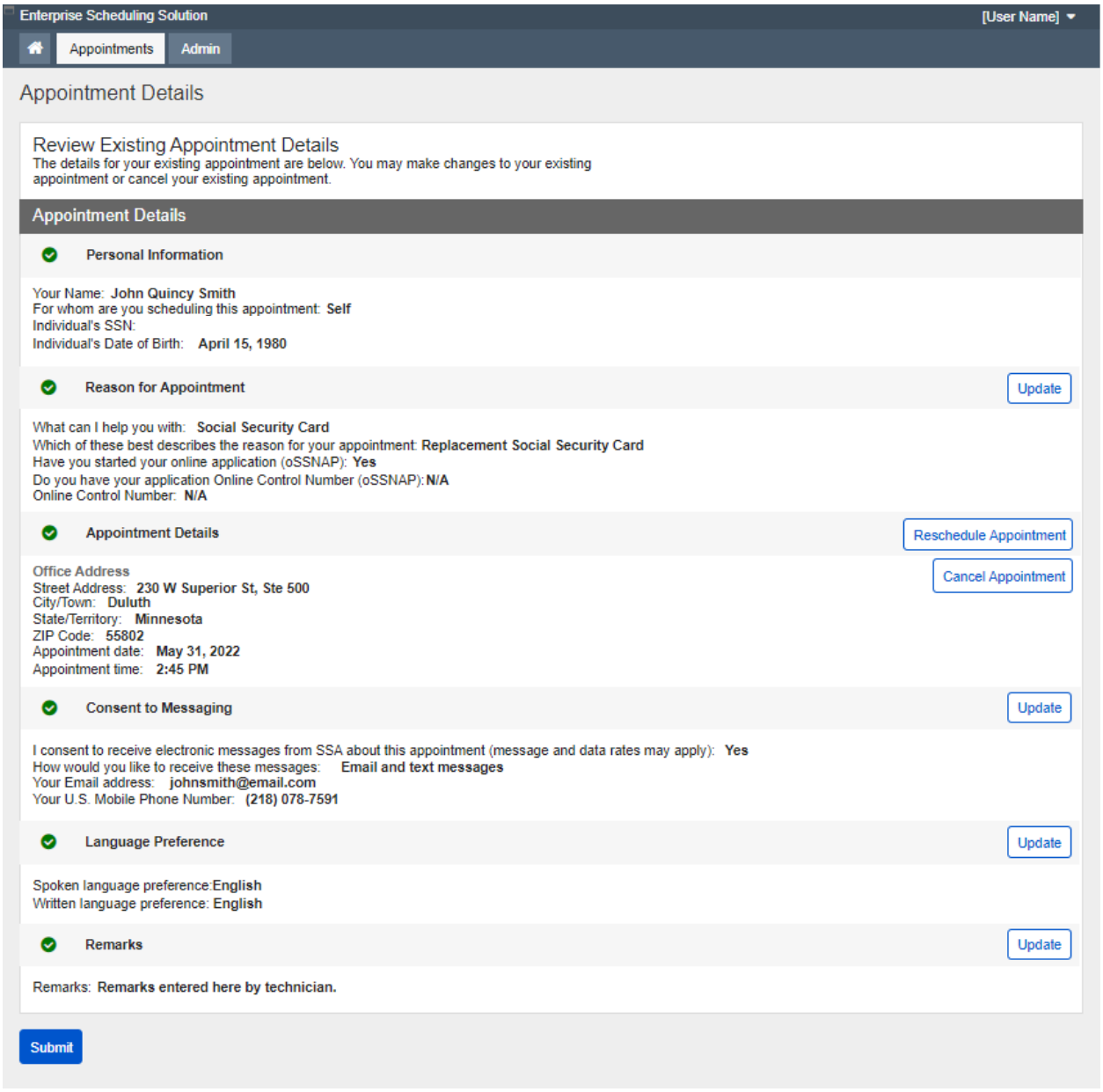


Figure 71 ESS Technician Review Appointment Details

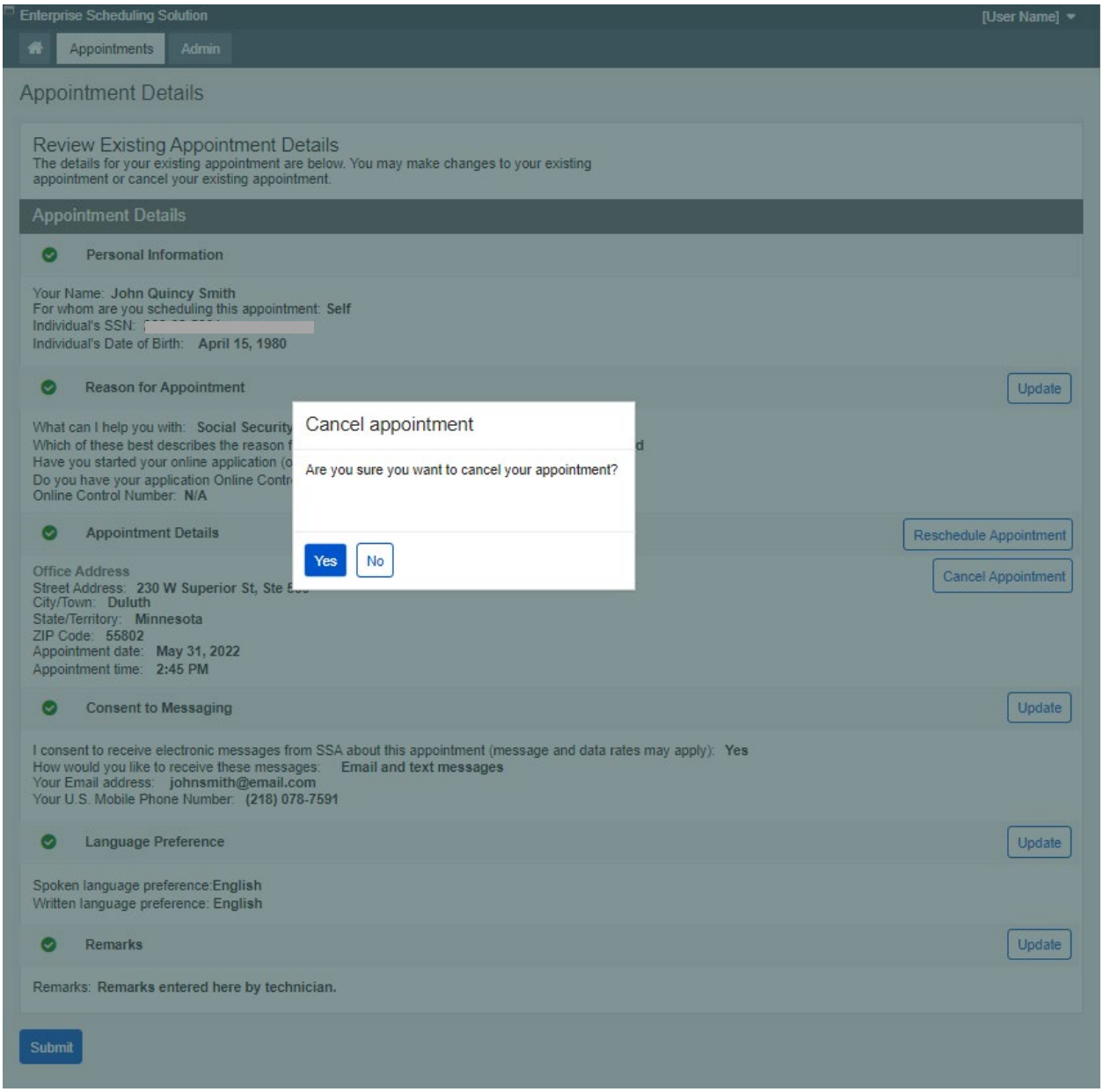


Figure 72 ESS Technician Cancel Appointment Confirmation

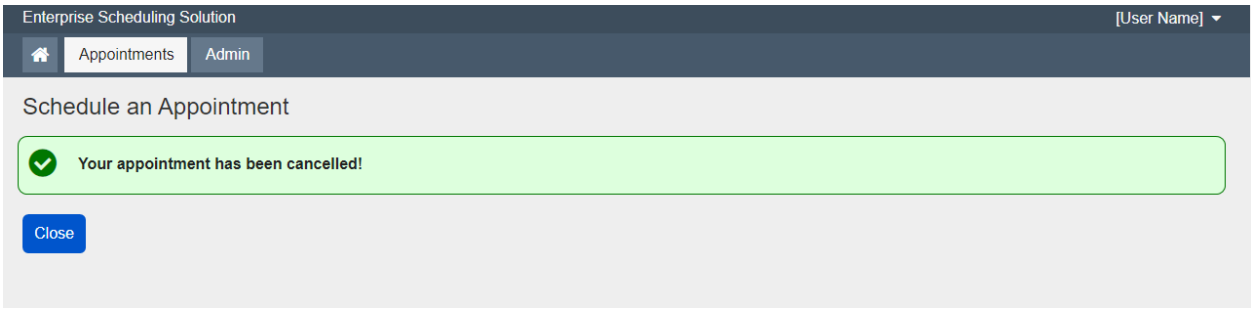


Figure 73 ESS Technician Cancel Appointment Success

2.3. Schedule Appointment for Someone Else

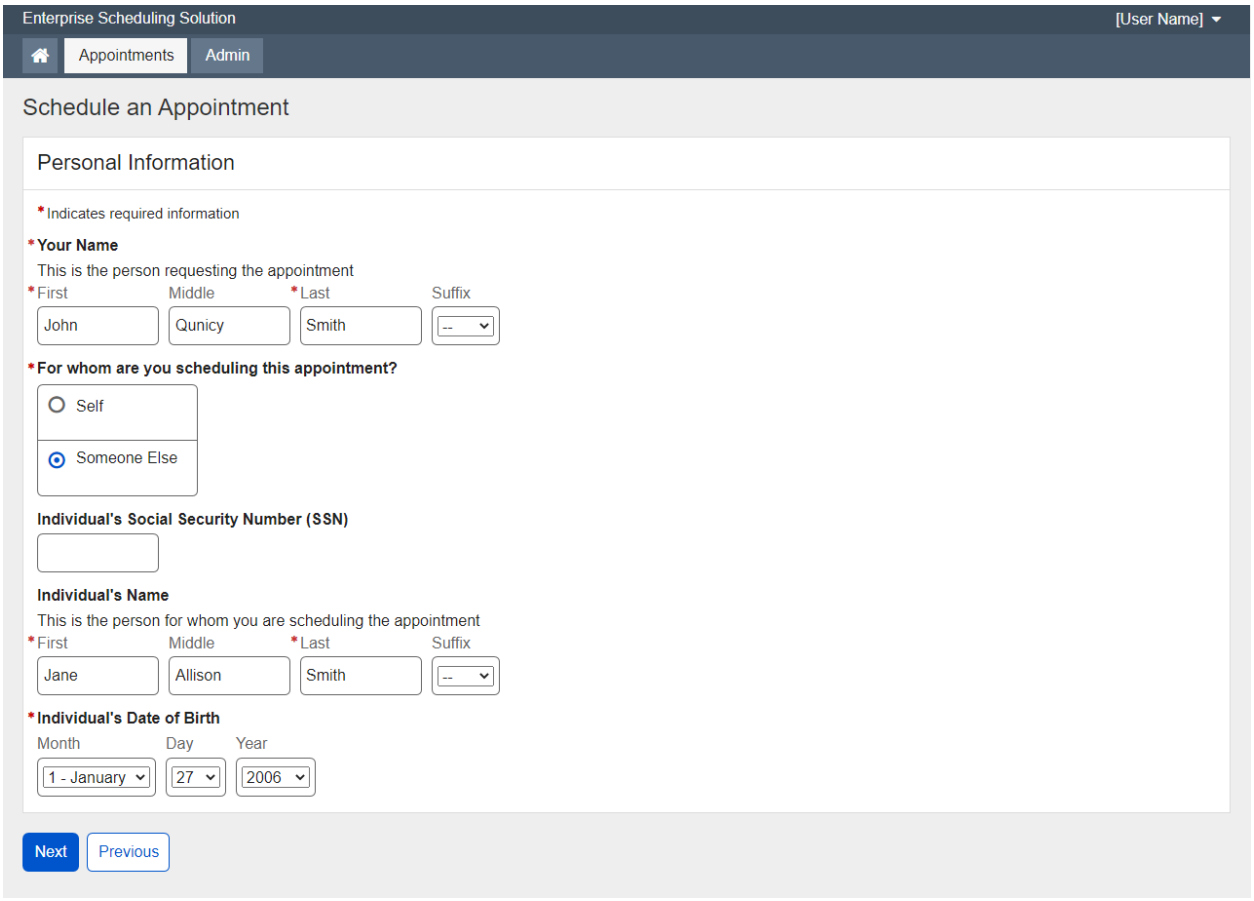


Figure 74 ESS Technician Personal Information for Someone Else

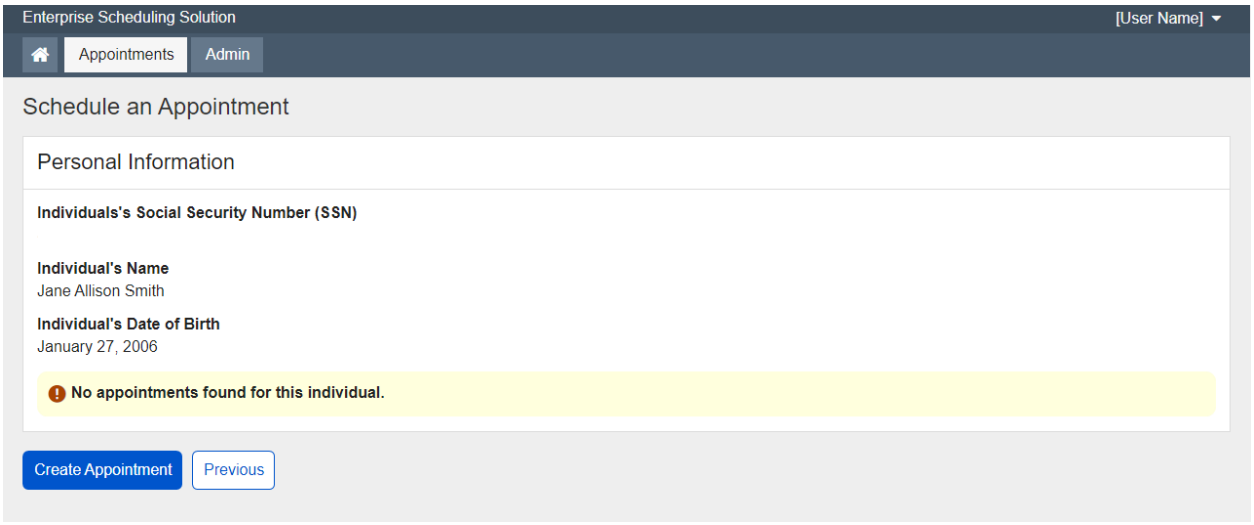


Figure 75 ESS Technician No Scheduled Appointment Found

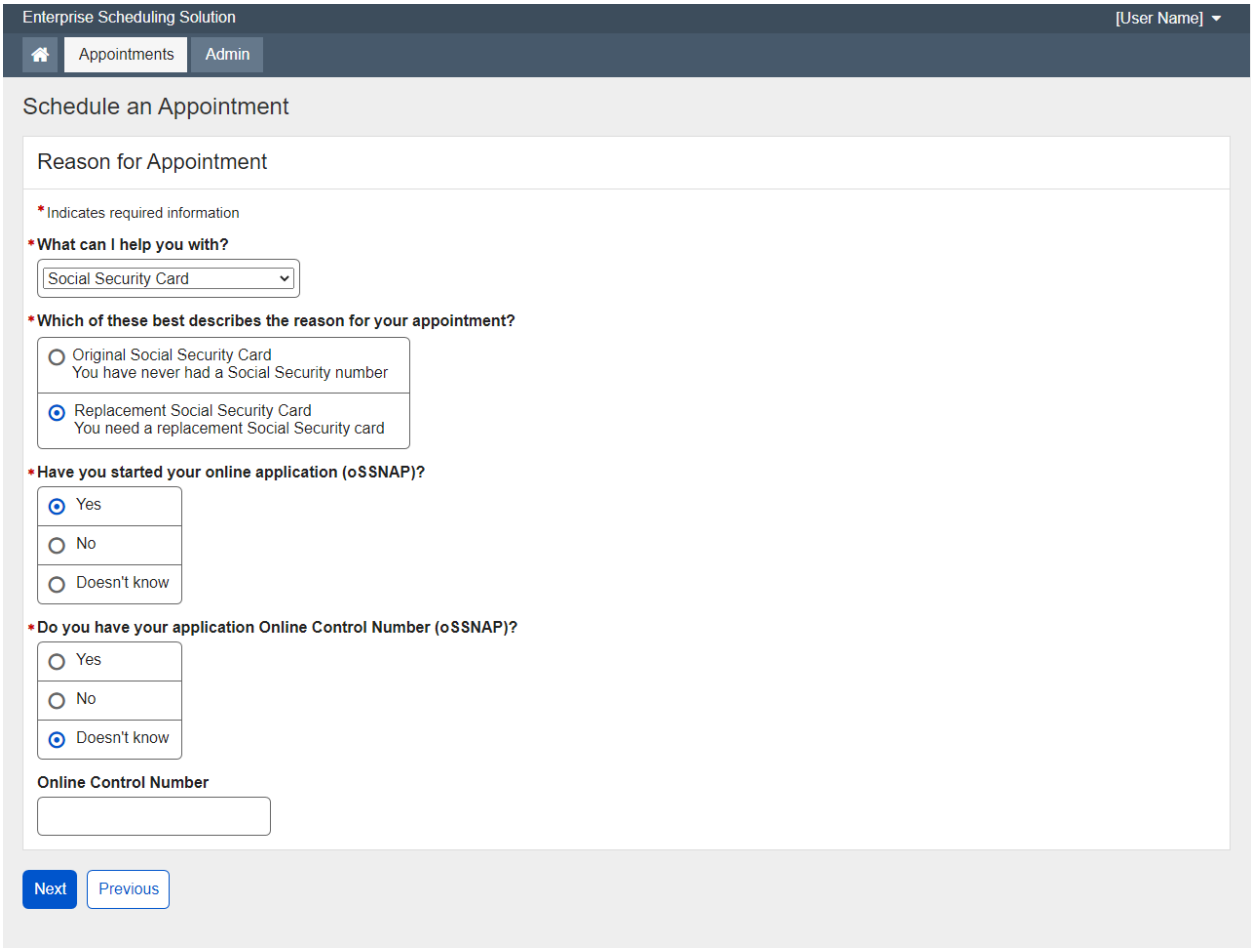


Figure 76 ESS Technician Reason for Appointment

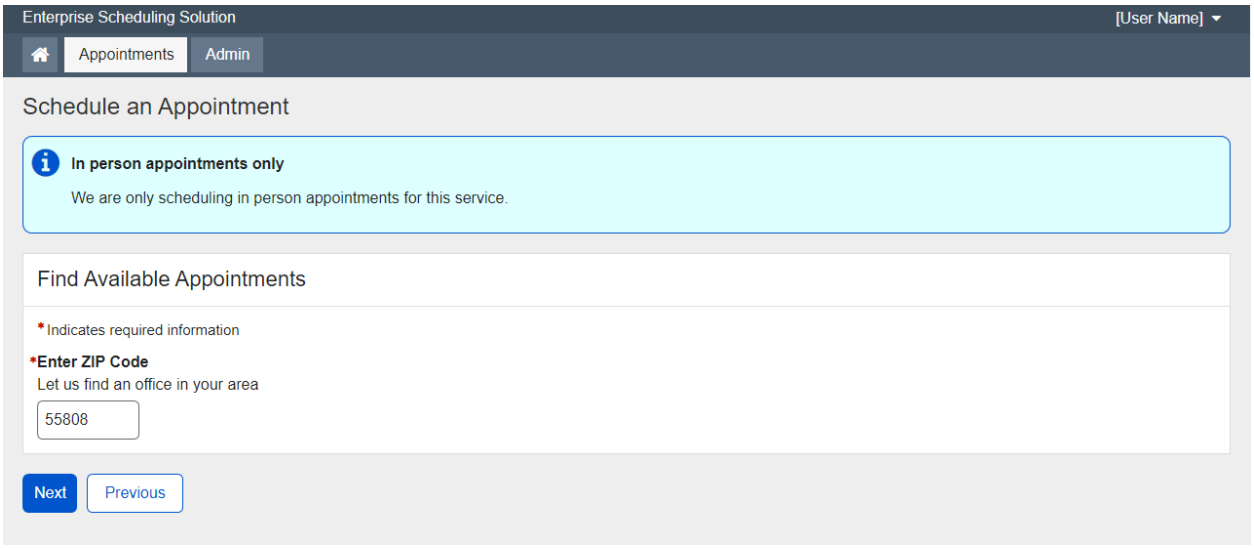


Figure 77 ESS Technician Enter ZIP Code

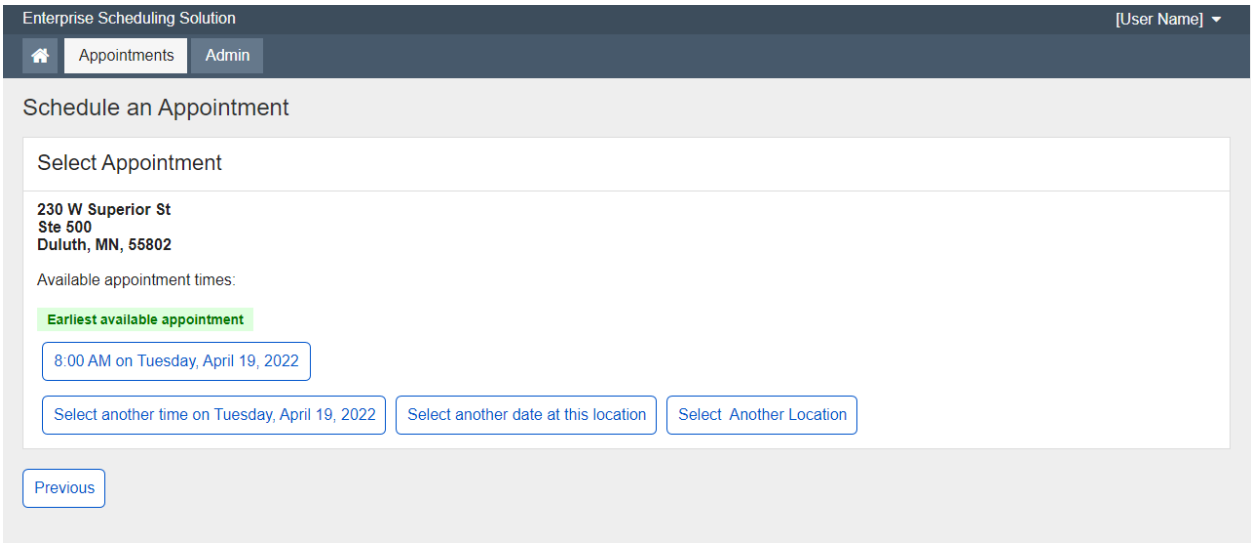


Figure 78 ESS Technician Earliest Available Appointment

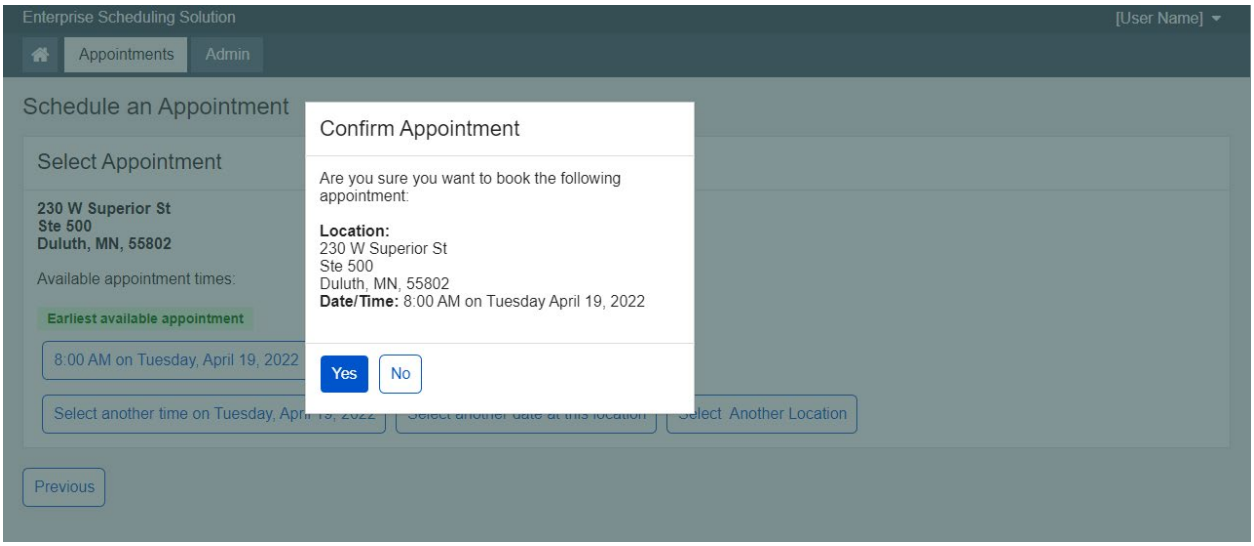


Figure 79 ESS Technician Confirm Appointment

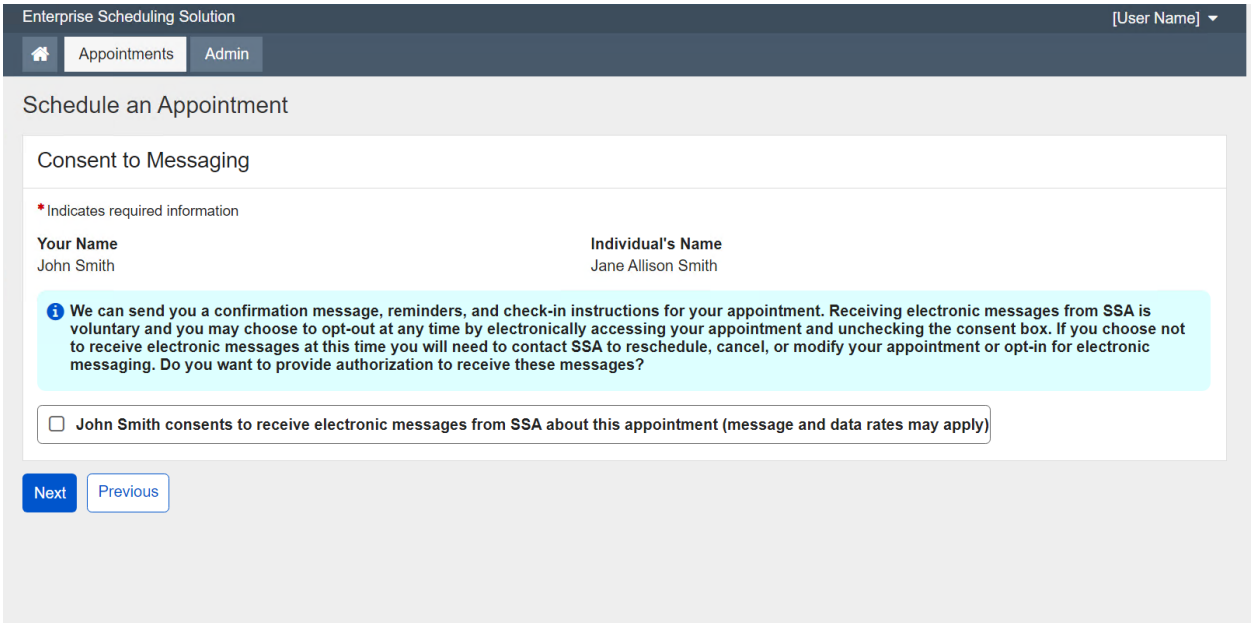


Figure 80 ESS Technician Consent to Messaging (Someone Else) Before Consent

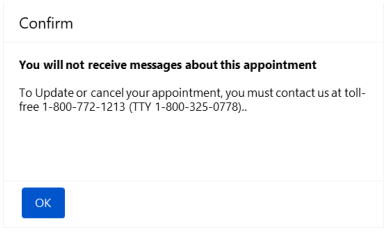


Figure 81 ESS Technician No Consent to Messaging Message

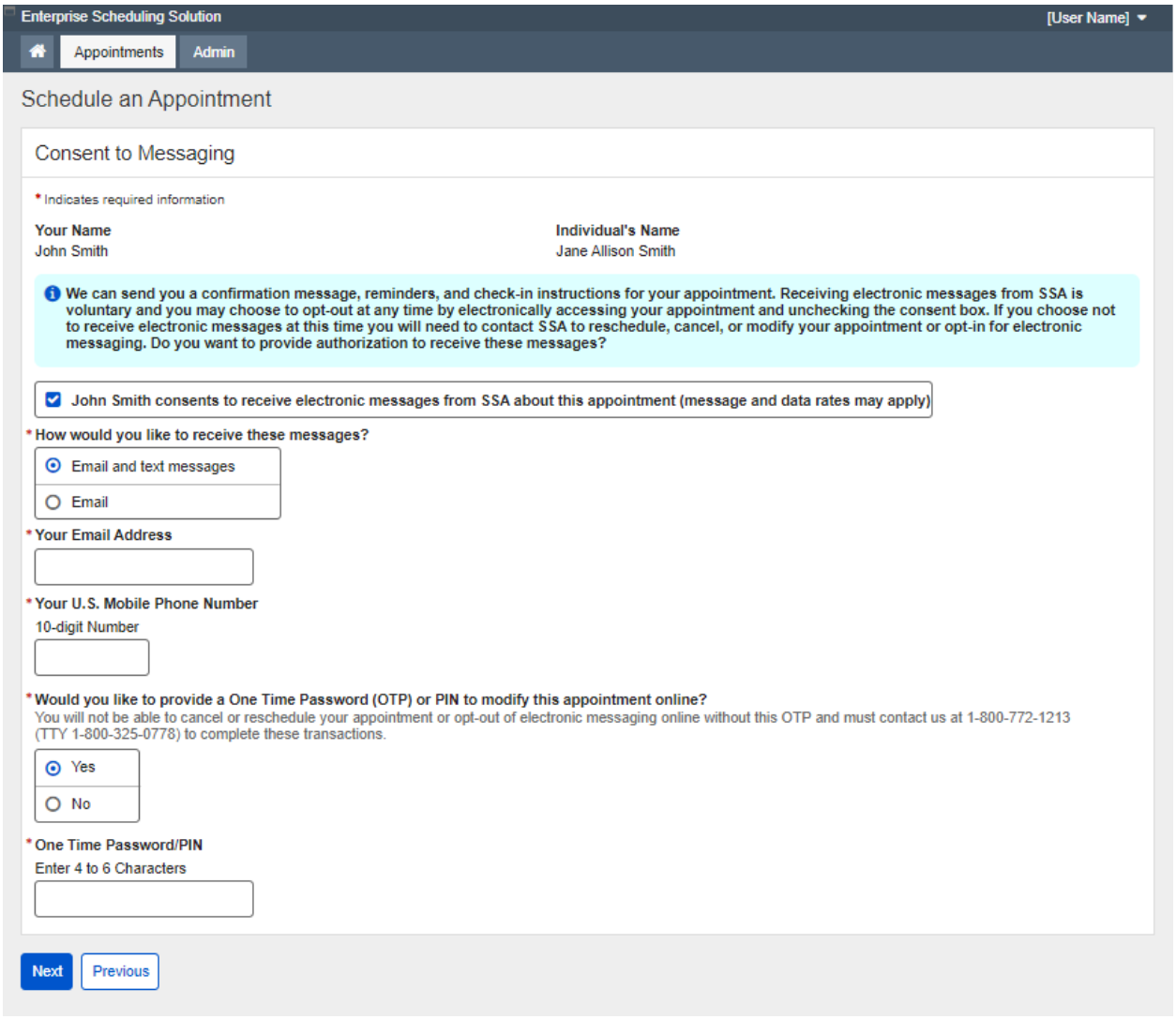


Figure 82 ESS Technician Consent to Messaging (Someone Else) After Consent

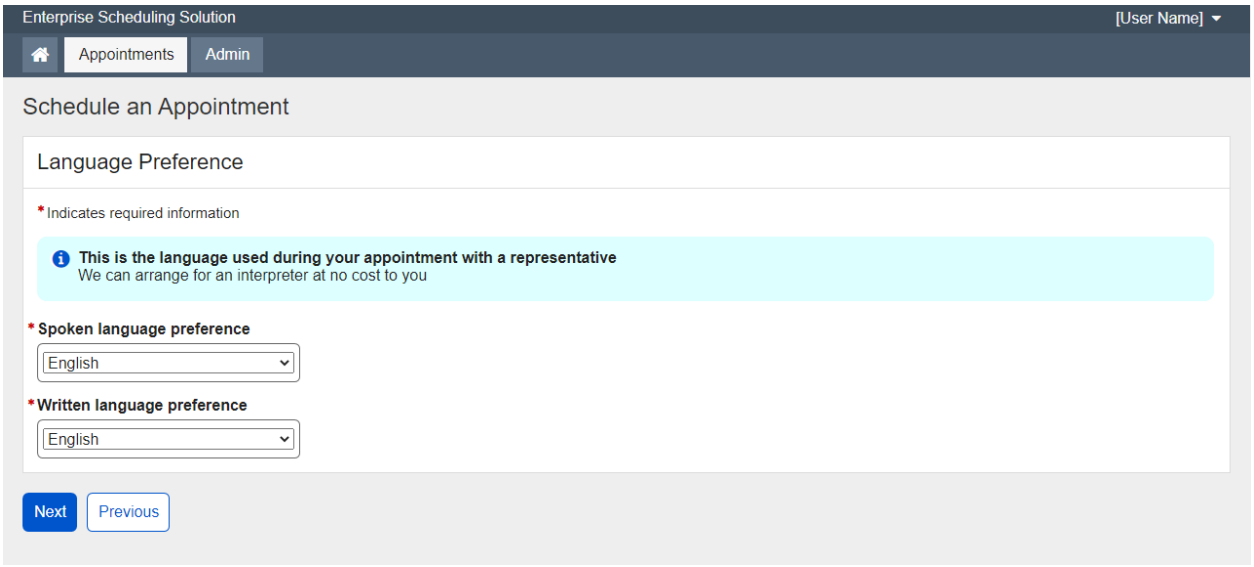


Figure 83 ESS Technician Language Preference

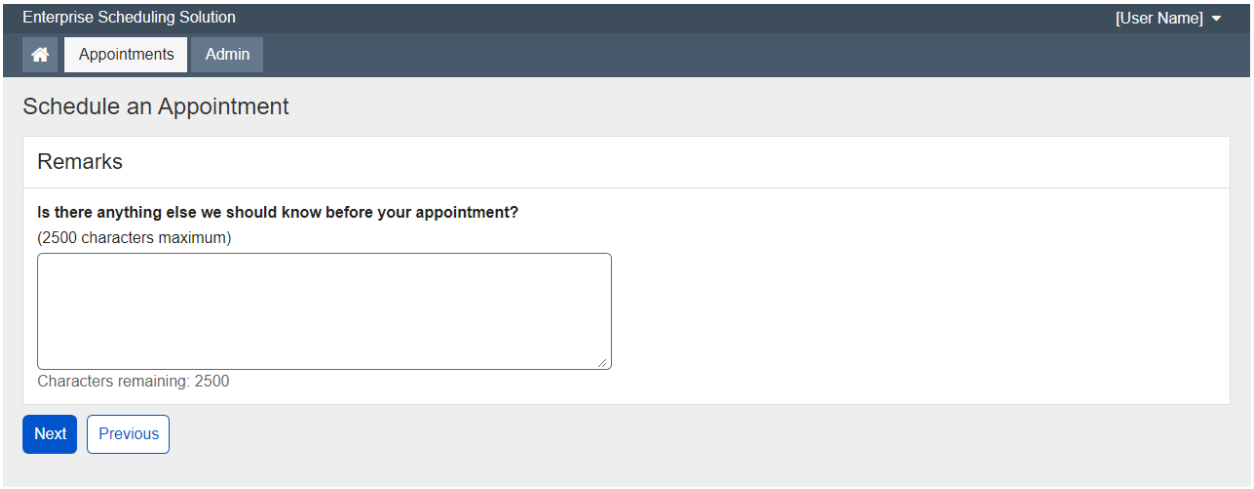


Figure 84 ESS Technician Remarks

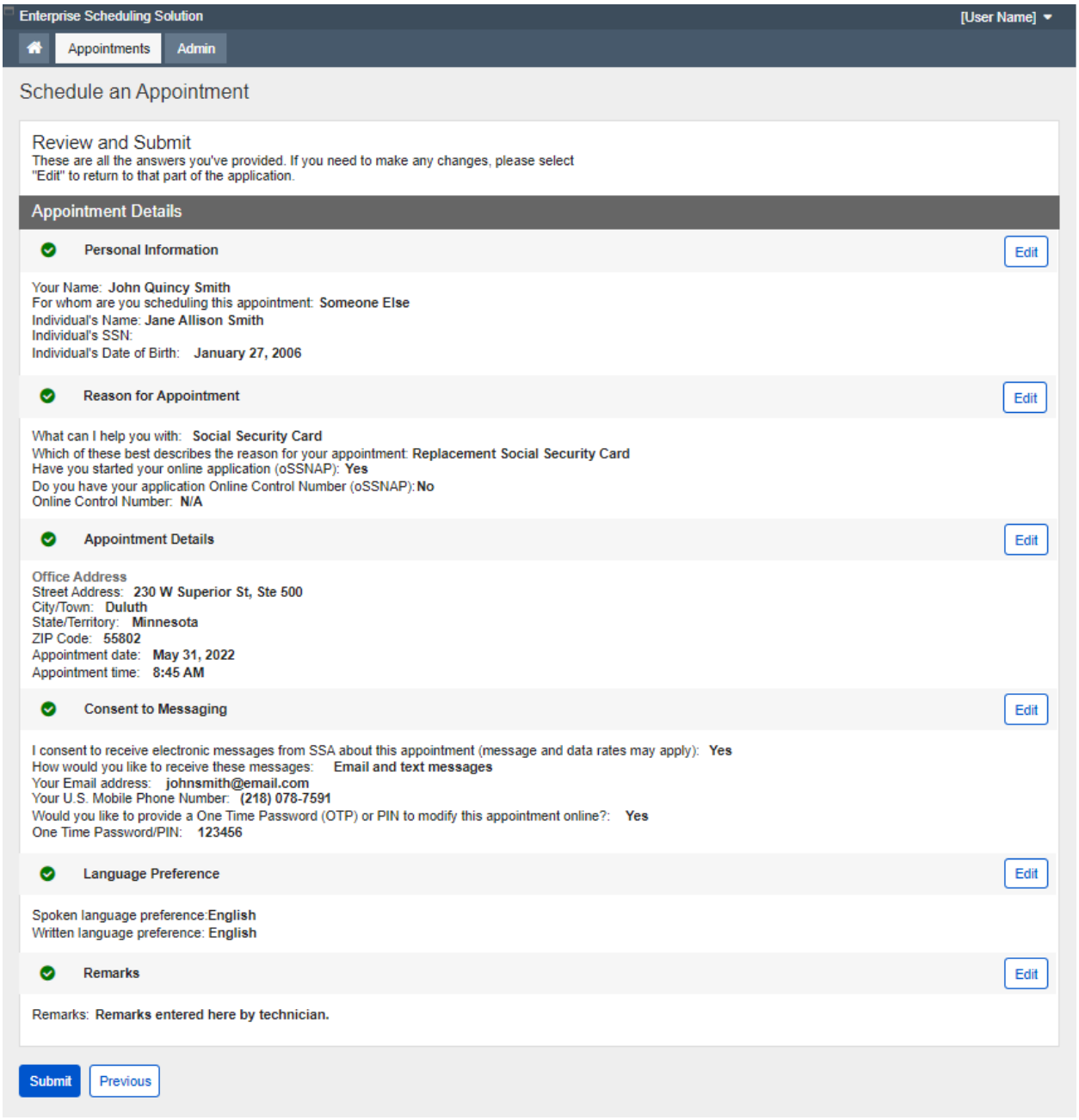


Figure 85 ESS Technician Review and Submit

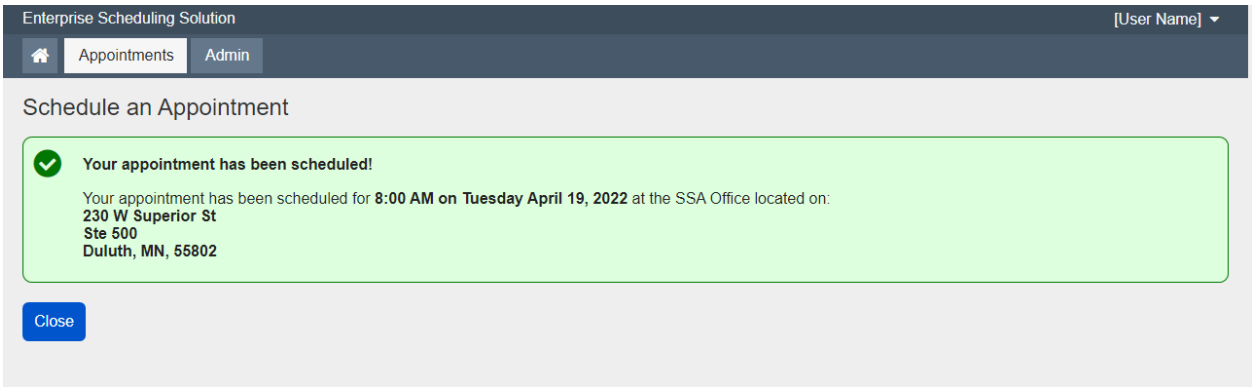
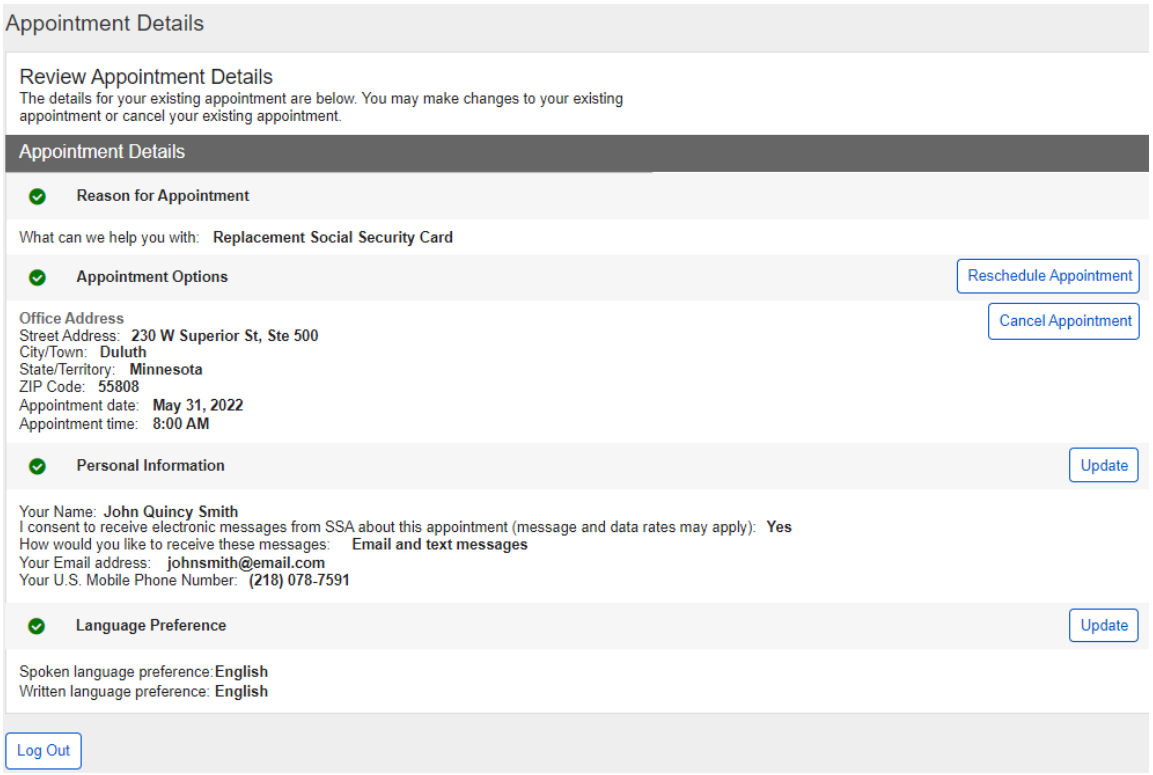


Figure 86 ESS Technician Appointment Scheduled Success

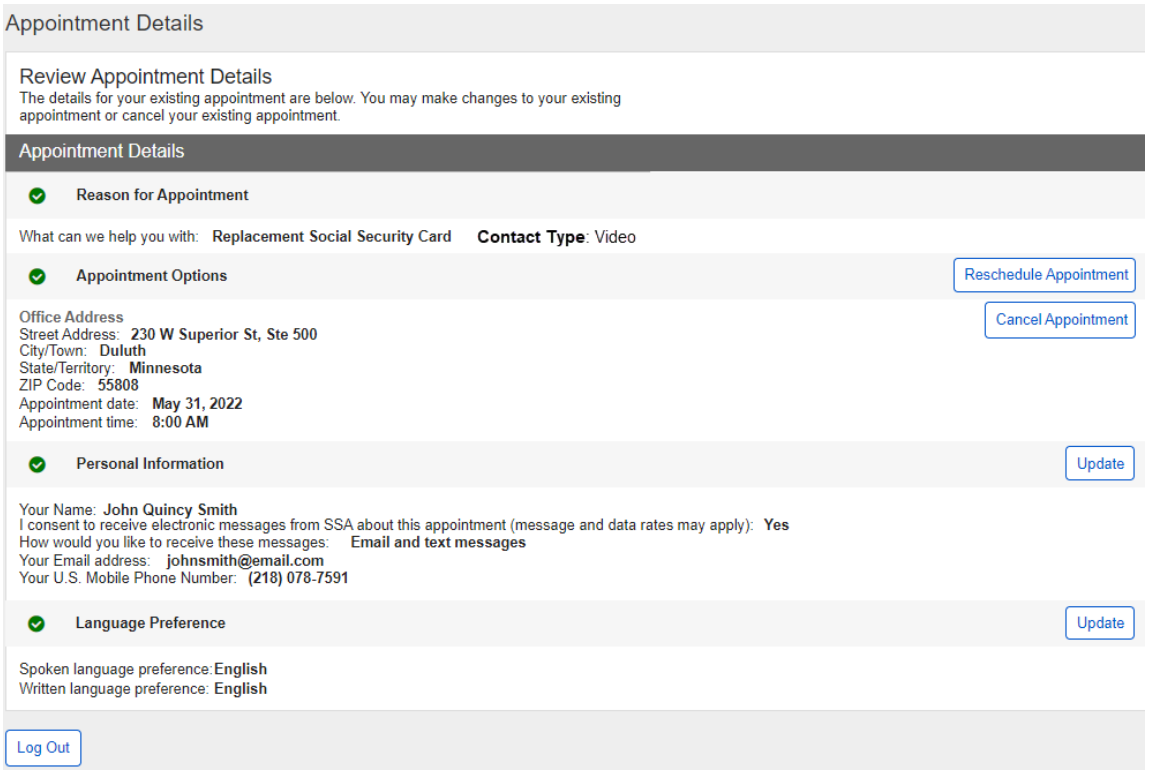
SSA will insert the following PRA Statement into the form as soon as possible:

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. We estimate that it will take about 3 minutes to read the instructions, gather the facts, and answer the questions. ***Send only comments regarding this burden estimate or any other aspect of this collection, including suggestions for reducing this burden to*****:** *SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.*

Original screen did not display contact type for the appointment.



New display will list the contact type of the appointment; either 'In Office' or 'Video' read only.



The original email listed ‘In Office’ for all appointments (outlined in red)

ESS email-

From: <no-reply@ssa.gov>
Date: Thu, Jul 20, 2023, 2:19 PM
Subject: Appointment Confirmation
To: <nahreen.ferdous.snl@gmail.com>

Thank you for contacting the Social Security Administration. You scheduled an in-office appointment with us. This is confirmation of the date and time of your appointment.

Date of Appointment: Friday, July 21, 2023
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: https://secureval.ssa.gov/ess/customer-ui/reschedule/RzlRHglr4E

The new email will list either ‘In Office’ as it currently exists, or ‘Video’ for appointments scheduled by a technician that the customer requests as ‘Video’ as the contact type (outlined in red).

ESS email-

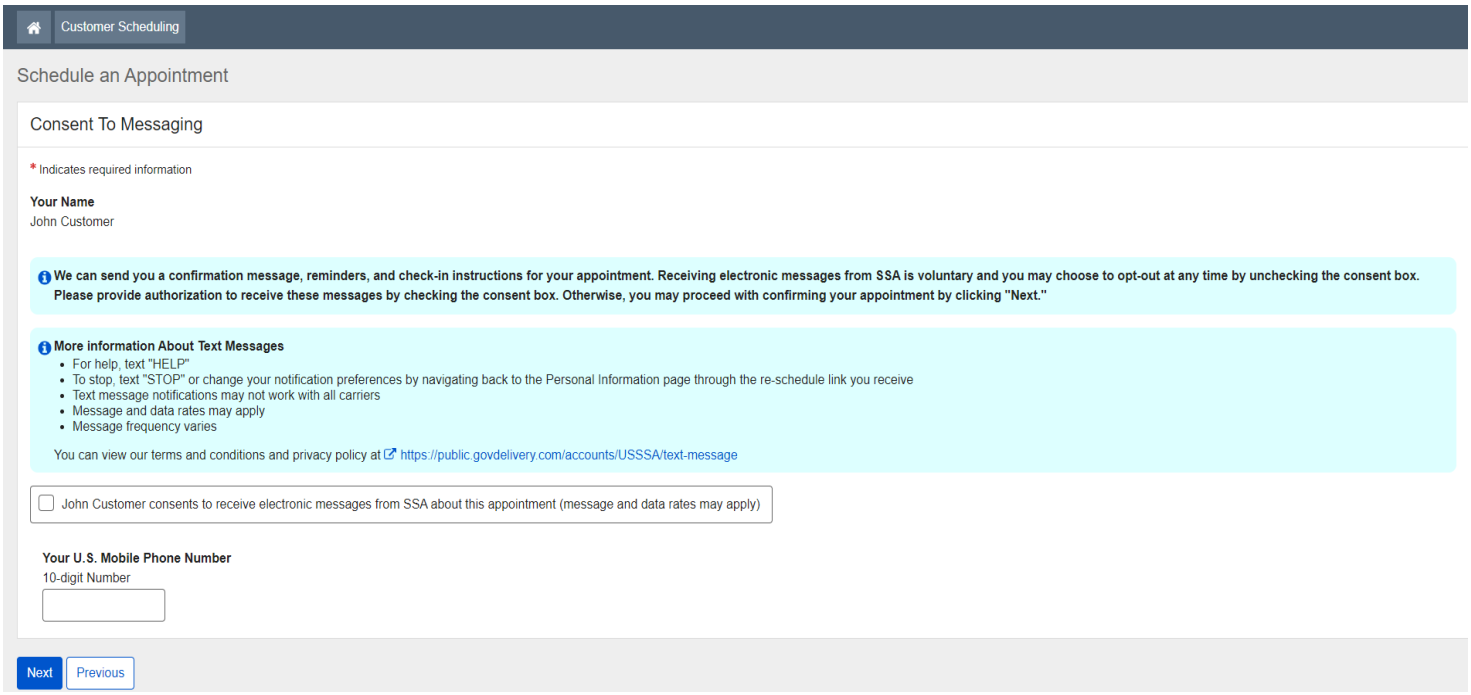
From: <no-reply@ssa.gov>
Date: Thu, Jul 20, 2023, 2:19 PM
Subject: Appointment Confirmation
To: <nahreen.ferdous.snl@gmail.com>

Thank you for contacting the Social Security Administration. You scheduled a Video appointment with us. This is confirmation of the date and time of your appointment.

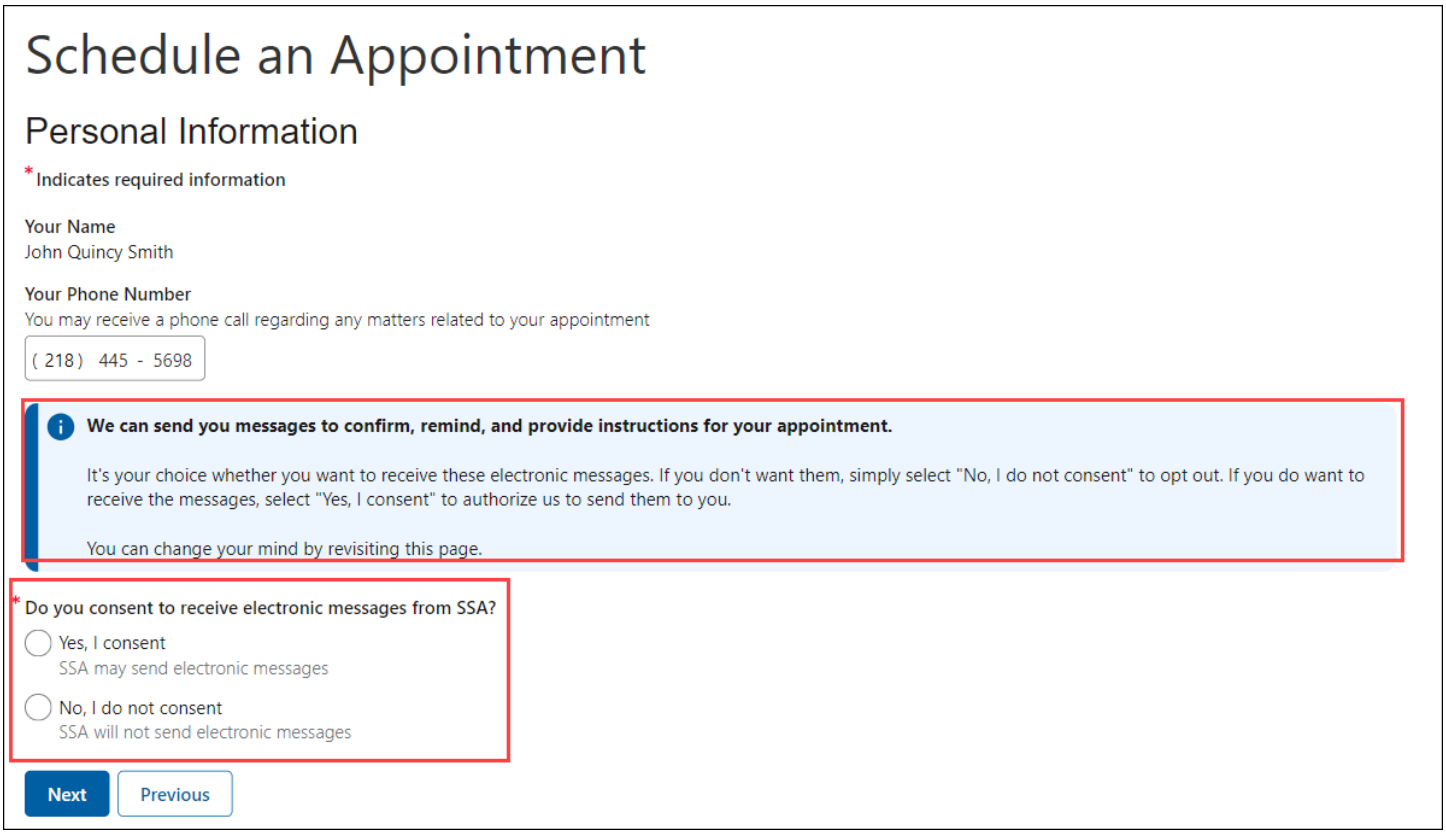
Date of Appointment: Friday, July 21, 2023
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: https://secureval.ssa.gov/ess/customer-ui/reschedule/RzlRHglr4E

Original Screen with passive non consent to electronic messaging, original informational banner for electronic messaging, and text message information presented to all users.

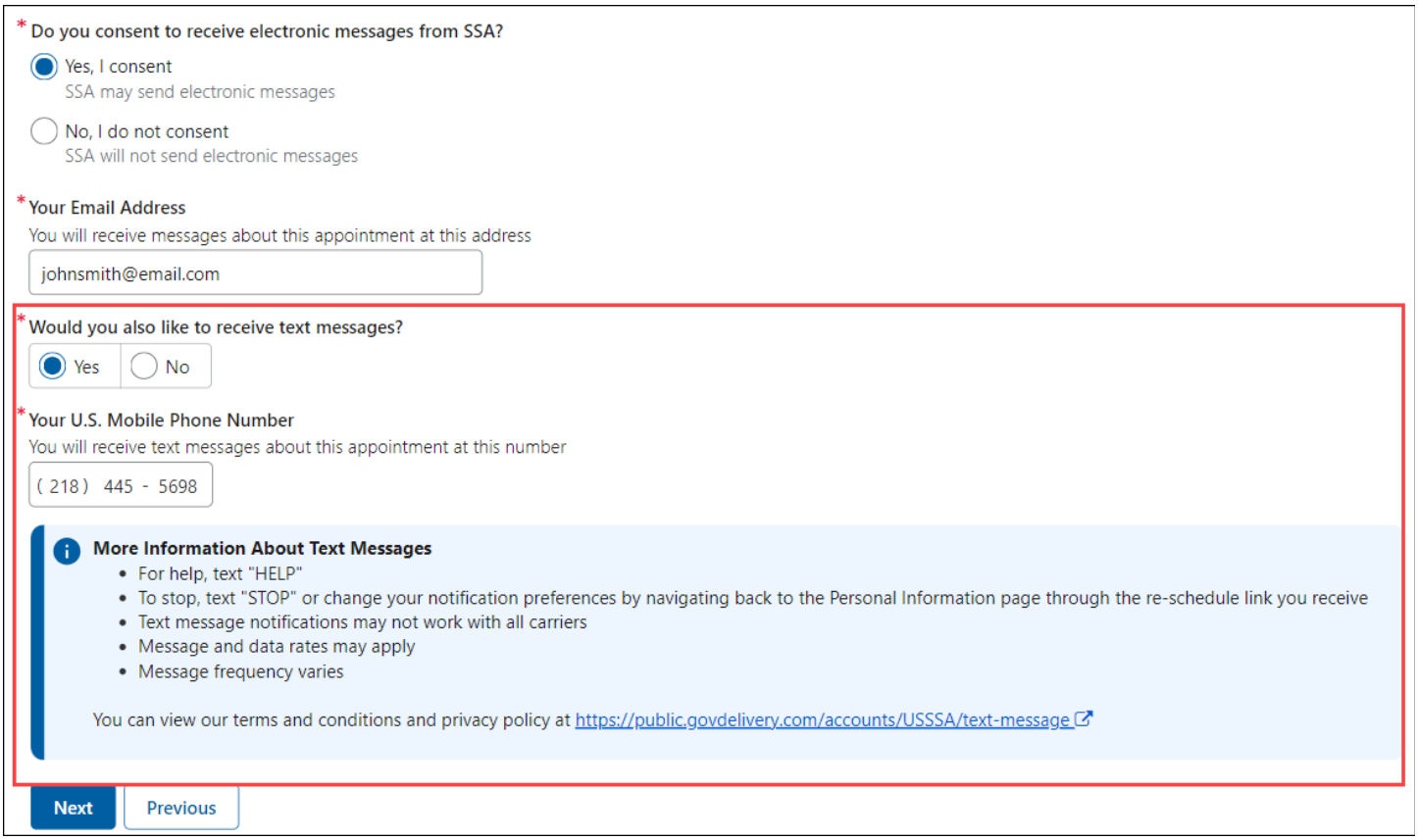


New screen with ‘Yes’ and ‘No’ options to consent to messaging and updated informational electronic messaging banner.

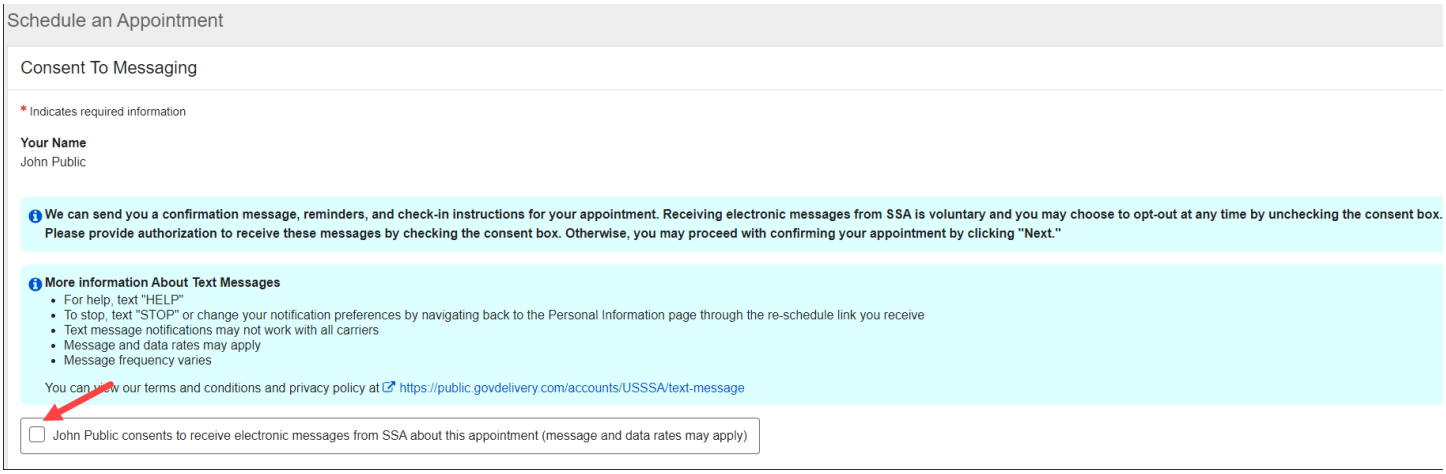


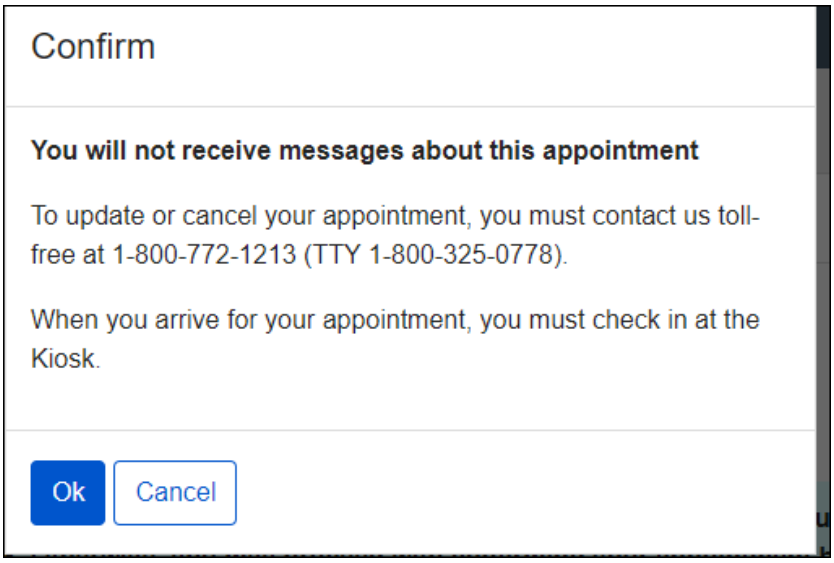
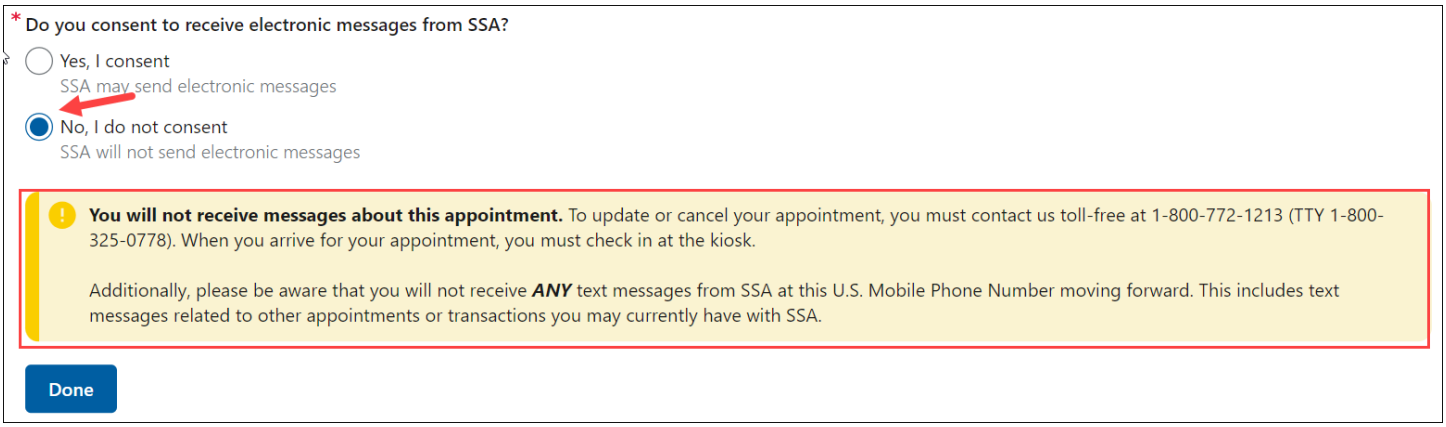
Original screen with U.S. Mobile Phone Number collection

New screen display when user selects 'Yes' to receive text messages and to display 'More Information About Text Messages' after a customer consents to receive text messages.



Original screen display in update path when the checkmark box is unselected and pop-up message displays.





New screen display for update path when a customer changes their response from 'Yes' to 'No' for consent to messaging.